User manual

WinServ II edition

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Chapter 1.

File

Contents: Change password
Switch users
Exit

File

The File menu contains the commands: Change password, Switch user and Exit.

Change password

If you want to change password for the user, click File and select Change password in the menu bar.

1. Enter the old password.
2. Enter the new password.
3. Confirm the new password.
4. Click **OK** to confirm the change.
5. Click **Cancel** if you do not want to change the password.

NOTE! If nobody remembers the old password, you must log in as Admin. That bypasses the need to type the old password.

Switch users

If you want to switch users in the program, click **File** and select
Switch user to open the WinServ login dialogue. This can also be used to log out of the program. In order to log in again, type your user name and password and click **OK**.

Exit

Click Exit to close WinServ.

Click **Yes** to exit, or **No** if you change your mind.

Chapter 2.

Program

Contents: Orders

- Service order
- Consumption order
- Order
- Return order
- Base order
- Interval order

Contracts

- Contractual invoicing
- Counter registration
- Unit package

Service

- Group dispatch
- Work schedule
- PM Order
- Interval service
- Discussion group
- Service calendar
- Project calendar
- Insert global message

Stock

- Purchase order
- Technician stock
- Technician stock removal
- Indelivery of goods
- Inventory

Sale support

- Todo
- Create ToDo
- Sale forecast
- Calendar
- Customer survey
- Customer survey questions
- Customer survey E-mail
- Customer survey transactions

Time transactions

- Time registration
- Time registration Service order

Course booking system (Optional)

- Course booking
- Courses
- Course calendar
- Locations
- Teachers
- Equipment
- Course category

Rental system (Optional)

- Rental order
- Rental calendar

Other

- User message

External programs

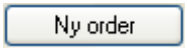
- External programs

Orders

The Orders tab contains Service order, Consumption order, Order, Return order, Base order consumption, and Interval order consumption.

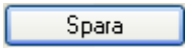
Service order

The Service order is used to create service call orders that the technicians use as a basis for their assignment, and the customers approve it by signing it.



Click **New order** to create a service order.

Click **Create order** to register data.
This assigns an order number.

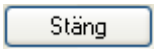


Click **Save** to save the changes.

Click **Update** to save data without closing the view.

Click **New object** to set up an object.

Click **Edit** to change data on the service order or object card.



Click **Close** to exit the service order view.

Click **History** to check previous service.

Click **Print** and select a print template with one of the following buttons.

Those icons have different functions. From the left:

- Copy service order.
- Retrieve maps (from external map provider) for any street address.
- Send e-mail to technician (assuming you have the e-mail address under Master data/technician).
- Send Text message to technician (assuming your mobile phone provider offers this service and that you have stated the address under Master data/Technician).
- Send the service order as a fax (assuming you have installed the WinServ fax application, which is an external optional application). It enables you to fax a tailor-made service order template to a PDA or fax.
- The last icon displays the products for which the technician has received training.

Service order tab

Group Incoming service call: Use code or free text to describe what needs to be carried out. Using codes to describe it will facilitate the statistics gathering.

Group Message: Displays any message that is noted about the object. The message can be registered and carried out under the Internal messages tab. You may also create those messages from the Object or Model.

Group General: Lists all the contact information

Times tab
Displays when the object was reported and when the call is expected to start and finish. It also displays the time when it was dispatched. You can make notes of any downtimes in order to prioritise. This is also where you register one or more technicians, if you want to be able to book them in the Service order calendar.

Click the symbol to view technicians stored under Booked technicians.

Click **Multi days** to book on or more technicians for more than one day.

Click the symbol to add the start time for the call. Real-time cancelling.

Click the symbol to update the times.

Delivery address tab
Here, you view or edit the address to the service call object. You select a delivery address either for one customer or for all.

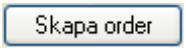
Other tab
This is where you set cost caps and make notes of temporary accessories, if anything has been lended, or set internal codes or technicians' bonuses. You can also see if this order was created through an Order (Original order no.) and what order no. it belongs to, in case the technician needs to know which parts have been installed.

Preliminary calculation tab
Here, you enter the budget for the service call, in order to compare it to the deviation in a report.

Invoice recipient tab
Here, you retrieve an alternative invoice recipient in case the invoice is to be sent to another company than the normal recipient.

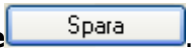
Register **Service order**

1. Click **Service order** in the menu bar.
2. Create a new service order by clicking **New order**

.
3. Select the object/installation by entering the object no. and pressing **F9**, or by clicking the button in the **Object** field, the list of objects is displayed and you select the correct object.
4. Press **F6** or click **Create order** 

to register the information.
5. Click

in the Task-code list.
6. Select **Task code** and click **Ok**

.
7. Click in the **Description** field, and enter the customer's description of the issue.
8. Click in the **Orderer field**, and register the individual who is reporting the issue.
9. Click in the **Telephone** field, and enter the phone no. The orderer can be the first box when you click New order, if you tick the checkbox "Do not ask who placed order".
10. If necessary, click the **Contact** field and enter the contact.
11. Select **Downtime** if the object cannot be used.
12. Save the call by clicking **Save** 

.
13. The call is now placed in the **Service order queue**.
14. View the service order queue by clicking **Service order queue** .

Your administrator can tailor the WinServ settings to your organisation's way of working. Through the tailor-made settings you can automatically get input windows on the screen that makes the registering of new service orders easier.

For example:

- Pre-defined list of **Task codes**.
- Automatic confirmation sent to customer, **E-mail** with information about received **Service orders**.
- Requirements for certain fields.
- Warnings for possible back jobs when registering the Service order.

Return visit (automatic pop-up when the service order is completed)
If a technician, for some reason, was unable to complete a service call, you use the **Return visit** feature. The system allows for changes enabling the person who cancels a service order to set up a return visit in connection with the completion of a service call. The new service call is assigned the same order number as the starting order, with the extension .01 added on at the end.

Create return visit.

1. When asked to create a return visit, click **Yes**.
2. The service order window opens or is placed in the Return visit queue, depending on your service order alternatives in System parameters.
3. A new Service order is created, using information based on the previous Service order.
4. Enter the necessary information in Incoming service call.
5. Click Save to save and close.
6. The service order is placed in the Return visit service order queue.

View Service order

There are several ways of viewing registered service orders. Two ways of viewing service orders from the Service order view are outlined below.

If you know the order no:

1. Click **Program**, select **Order** and then **Service order**
2. The **Service order** view is displayed.
3. Click in the **Order no.** field, and enter the order no.
4. Press **TAB** or **F9** to view the selected service order.

If you do not know the order no:

1. Click **Program**, select **Order** and then **Service order**
2. The **Service order** view is displayed.
3. Click … by the **Order no.** field to view the order list.
4. Select the queue in which the service order is registered, or select Status **All**.
5. Select the Service order from the list.
6. Click **Ok**
7. The selected Service order is displayed.

Schedule/change time of Service order

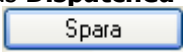
1. Open the desired service order (see View Service order)
2. Select the **Service order** tab.
3. Click in the **Scheduled start** field.

4. Enter the time when you want the service call to start.
5. If you want the change to be visible in the service calendar as well, you must tab your way through the field Booked technician, to change the start and end dates.
6. Click **Save**

to save and close.

Delegate Service order

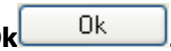
1. View the service order (see View Service order)
2. Click by the **Technician** field to view the technician list.
3. Select the technician and click **Ok**

.
4. Check status **Dispatched**
5. Click **Save** 

to save and close.

Include parts in Service order

In WinServ, you can add parts to a Service order in advance. This is helpful if you want to inform the technicians about the parts necessary to complete the service call. The included parts will be displayed on the Service order when it is printed.

1. View the service order (see View Service order)
2. Click the **Order rows** tab.
3. Click in the **Article no.** field and press F4, or click Article no.>> in the list, to view the list of articles.
4. Select the article and click **Ok** 

.
5. Use TAB to go to the **Qty** field and enter the quantity needed.
6. Save the row by pressing **TAB** until the cursor reaches a new row.
7. Repeat the procedure for every article to be included with the service order.
8. Click **Update** to save.
9. Print the Service order (see Print Service order)

Change technician for dispatched service order

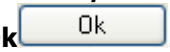
1. Open the desired service order (see View Service order)
2. Click by the Technician field to view the technician list.
3. Select the technician and click **Ok**

.
4. Click **Save**

to save and close.

Print Service order

1. Open the desired service order (see View Service order)
2. Click

and select **Service order.**
3. Select any extra document you want to include with the Service order.
4. Select **Printer/send fax/e-mail** to print directly.
5. Click **Ok** 

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Send Service order as Fax/e-mail

1. Open the desired service order (see View Service order)
2. Click the **Service order** button.
3. Click **Print Service order**.

4. Select any extra document you want to include with the Service order.
5. Enter e-mail address or fax number in the settings under Fax/e-mail to.
6. Select **Printer/send fax/e-mail** and click **Ok**.

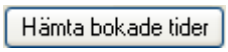
NOTE! This requires the fax application Unimessage or P3. You can also e-mail the service order as a text file, without a template, to the technician. To do that, click on the service order.

Change object on existing Service order

1. Open the desired service order (see View Service order)
2. Click the **Edit** button.
3. Select **Change main information on service order**.
4. Enter the object number and press **F9** or **Tab**. You can also click the prompt and select the object number from the list.
5. Click **Save**.

Time report tab

- Group Times: This is where you enter the internal time (cost) in the form of work time, travel time and travel distance for the object.
- Group Action codes: Here is where you enter the Action codes describing what has been carried out. The codes facilitates the description and statistics that can be used e.g. for purposes of complaints to the supplier.
- Group Action description: Here is where you describe what has been carried out in free text, for the customer's information.
- Group Message: Here is where you add a message about anything that should be done at the next service visit. You also tick it once it has been carried out.
- Group Internal notes: Here is where you add internal notes about the service order. If you need more space you can use the service log tab.
- Group Quality: Here is where you add a quality code for the completed order. For quality assurance.



Retrieves the times from Booked technicians and adds them to the time report rows.

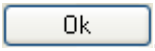
Click the icon if you want to add a time report in real time. This assumes that you have clicked the same icon at Start time on the Times tab.

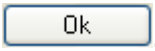
Click this icon to add Action codes and Action text for each reporting row.

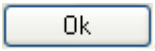
Click this icon to refresh the sum total of the reporting rows.

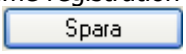
Time report

1. Open the desired service order (see View Service order)
2. Click the **Time report** tab.
3. Click in the **Arrival** field and enter the date when the service call was started, using the format ****-**-**. Go to the next field by pressing **TAB**.
4. Enter the time when the service call was started, in the **Start time** field. Go to the next field by pressing **TAB**.
5. Enter the date in the **Completed** field, using the same format as before. Go to the next field by pressing **TAB**.

6. Enter the time when the service call was finished, in the **End time** field. Go to the next field by pressing **TAB**.
7. The system automatically calculates the proposed work time and displays it in the **Work time** field. Adjust the time for lunch and breaks, etc. Press **TAB** to continue.
8. Time that should be deducted from the Time bank is calculated automatically and displayed in the **TB min** field; adjust if necessary. Go to the next field by pressing **TAB**.
9. Enter the travel time in minutes, in the **Travel time** field. Go to the next field by pressing **TAB**.
10. The system automatically calculates the amount of time to be deducted from the Time bank and displays it in the **TB min** field. If necessary, adjust the time to be deducted.
11. Enter the distance travelled in the **Travel distance** field. Continue by pressing **TAB**.
12. Enter the per diem in **Per diem**. Continue by pressing **TAB**.
13. Click in the **Tech>>** field, or press F4, select a technician from the list and click **Ok** 

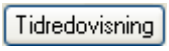
. Continue by pressing **TAB**.
14. Click in the **Call type>>** field, or press F4, select a call type from the list and click **Ok** 

. Continue by pressing **TAB**.
15. Click in the **Time type>>** field, or press F4, select a time type from the list and click **Ok** 

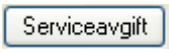
.
16. Complete time registration by pressing **TAB** until the cursor is in a new row.
17. Click **Save** 

to save and close.

Order rows tab

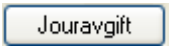


Click **Add Time report** to add the time report rows to the invoice rows. That requires that you entered work time and travel time on a technician's level.



Click **Add Service fee** to invoice the service fee from the object card in connection with service.

Click **Add Unit package** to invoice a package of copies to a customer in connection with service.



Click **Add On-call fee** to add the fee in connection with service.

Click **Send to Order** to send an order for the parts on the service order to a supplier.

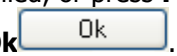
Click **Send to equipment** to add the parts on the service order to the equipment list for the object.

Here is where you register the articles you want to invoice (Invoice checkbox and sales price) or tick off against the stock (whitout invoice checkbox and sales price).

- Group Internal code: You can have several companies in WinServ and use internal codes to send the order file to different folders for registering with different companies in the business application. You select it here, but its master data is registered under Parameters/Object/Internal code.

- Group Alternative customer no.: Enter/retrieve the customer number to send this invoice to a different invoice recipient from the one stated on the object card.
- Group Currency: Here, you ensure that the correct currency code is included in the service order's order file.
- Group Articles: You double-click the article you want to add to the invoice row. This top-ten list is created under Model, and is based on the previously reported articles.
- Group Add: Explained above.
- Group Send to: Explained above.

Report material and services – create invoice basis

1. Open the desired service order (see View Service order)
2. Click the **Order rows** tab.
3. Click in the **Article no.>>** filed, or press **F4**, to view the article directory.
4. Select the article and click **Ok** 

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5. If necessary, enter the warehouse from which the part should be taken.
6. Go to the **Qty** field by using the **TAB** key, and enter the quantity used in Ordered and Delivered. Go to the next field by pressing **TAB**.
7. Tick the box under Invoice, to invoice the articles. An empty Checkbox means that the article automatically is priced at SEK 0 on the invoice. Go to the next field by pressing **TAB**.
8. Check that **Cost price**, **Sales price** and **%** (discount) are correct.
9. Save the row by pressing **TAB** until the cursor reaches a new row.
10. Repeat the procedure for every article to be added/changed.
11. Change the status to **Completed** when all invoice rows are added and the service order is complete.
12. Click **Save** to save and close.

Counters tab

Objects are equipped with more and more counters, and therefore the usual four counters are insufficient. For that reason, we have created a tab for dynamic counters, where you list the counters if you want more than four.

Fixed tab: Here is where you enter the counters when using only four.

Dynamic tab: Here, you can enter an infinite number of counters. (It is activated by a checkbox in System/System parameters/Basic settings/Contractual debiting).

Return/Warranty tab

The **Return/Warranty** tab is used to manage your returned objects or spare parts.

Click **Create return** to transfer the parts to a return order. That enables you to print a return slip to attach to the spare part.

Click **Return form** to create a return form for the object, e.g. in case of DOA.

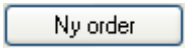
Protocols tab
If you have set up a protocol for what needs to be done regarding service for a specific object under **Parameters/Object/Protocols**, you can tick the appropriate checkboxes on this tab.

Deviations tab
Follow up internal quality assurance work by selecting a deviation code, e.g. materials flaw.

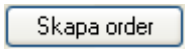
Documents tab
Enter the path to the document to be added to the service order.

Service log tab
Register more internal comments or notes about the service order.

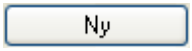
Consumption order
In **Consumption order**, you create orders from a customer for an object's consumables. It is easy to find the articles in the consumption order as they are linked to model registration. When you place a consumption order, a statistical basis is created that can be displayed in various reports.



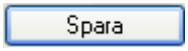
Click **New order** to create a consumption order.



Click **Create order** to register data**.**
This assigns an order number.



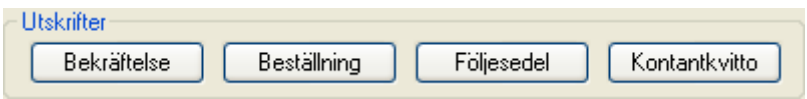
Click **New** to create a quick set-up of an object.



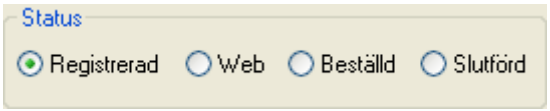
Click **Save** to save the changes**.**

Click **Update** to save data without closing the view**.**

Click **Close** to exit the Consumption order view**.**



Click the button corresponding to the print template you need**.**



Tick the appropriate status box and click **Save**.
This enables you to distinguish between the orders and to know what has been done.

Register consumption order

1. Click **Programs** in the menu bar and select **Orders/Consumption order**, or click the Consumption order icon .
2. Click **New order** or press Enter.
3. Enter **Orderer** or click the prompt to retrieve the correct contact from the list, and click **OK**.
4. Enter object number and retrieve the information from the database by pressing **F9**, or click the prompt , search for the object, select it and click **OK**.
5. Click **Create order** or press Enter to register data. This assigns an order number.
6. Most fields are filled in with information from the object card and from what you entered under Orderer (see 3 above). Those fields can be edited. Fill in the fields **Order mark**, **Your contact** or **Text** if you want to display them on the invoice.
7. Double-click the article you want to sell in the field at the bottom of the page. If there is no article there, you must register it under Master data/Model/Consumption/Accessories/Consumption. Those articles should be the consumables that come with the model. (Check with the supplier). You can also find the article in the article directory by clicking the Article number or Description in the article field.
8. Ensure that the correct article, quantity and price are displayed in the article row. Include all the articles the customer wants in the article row, and check the order.
9. Select the **Status** in which to save your order, e.g: **Ordered,** if you have ordered the articles to be included; **Web** when the order is placed through Customer on-line; and **Completed** when the order is done.
10. Click **Save** to save the consumption order.

Accessories tab
Displays the accessories with which the object has been configured.

Price matrix tab
Displays the prices for specific articles from both object and customer levels.

History tab
Displays the object's history of service orders, contractual debiting and consumption orders.

Object tab
Displays the parameters from the object card.

Model tab
Displays the parameters from the model card.

Printouts tab
Displays the printouts for this order.

Delete or change article row

If you selected the wrong article row, you can delete it by highlighting it and clicking the icon. Alternatively, you can click Artikelnr >> to open the list and search for the correct article.

Delete consumption order

You can delete the entire consumption order by selecting the order number and clicking the icon.

View Consumption order

There are several ways of viewing registered consumption orders. Two ways of viewing consumption orders from the Consumption order view are outlined below.

If you know the order number:

Click **Program/Order** and select **Consumption order** or click the icon.

1. The **Consumption order** view is displayed.
2. Click in the **Order no.** field, and enter the order no.
3. Press **TAB** to view the selected service order.

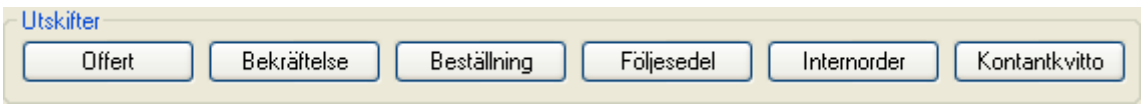
If you do not know the order number:

1. Click **Program/Order** and select **Consumption order** or click the icon.
2. The **Consumption order** view is displayed.
3. Click [...] by the **Order no.** field to view the order list.
4. Select status **All** to list all existing consumption orders, or select the status assigned to the order.
5. Select the Consumption order from the list.
6. Click **Ok** [Ok] or double-click the order row.
7. The **Consumption order is** displayed.

Order

In Order, you create an offer based on customer information and article numbers that, after confirmation by the customer, is converted to an Order.

[Ny order]	Click **New order** to create a new order.
[Skapa order]	Click **Create order** to register data**.** This assigns an order number.
[Ny kund]	Click **New** to create a quick set-up of a new customer.
[Spara]	Click **Save** to save the changes.
[Uppdatera]	Click **Update** to save data without closing the view**.**
[Stäng]	Click **Close** to exit the Order view**.**



Click the button corresponding to the print template you need**.**

Tick the appropriate status box and click **Save**. This enables you to distinguish between the orders and to know their status.

Skapa serviceorder — Click **Create service order** if you want to create a service order in connection with Order.

Till utrustning — Click **To equipment** if you want to add articles to the object's equipment list.

Skapa prognos — Click **Create forecast** to make a forecast of the Order.

Register Order

1. Click **Program** in the menu bar and select **Orders**, or click the icon.
2. Click **New order** or press Enter.
3. Enter **Orderer** or click the prompt to retrieve the correct contact from the list, and click **OK**.
4. Enter customer number and retrieve the information from the database by pressing **F9**, or click the prompt , search for the object, select it and click **OK**.
5. Click **Create order** or press Enter to register data. This assigns an order number.
6. Most fields are filled in with information from the customer card and from what you entered under Orderer.
   (See 3 above). Those fields can be edited. Fill in the fields **Order mark**, **Your contact** or **Text** if you want to display them on the invoice.
7. Fins the article you want to sell, either by selecting the Article no. field and pressing F4, or by clicking Article number or Description in the article field and open the list. Find the correct article and click **Ok**.
8. Ensure that the correct article, quantity and price are displayed in the article row. Include all the articles the customer wants in the article row, and check the order.
9. Select the **Status** in which to save your order, e.g: **Ordered,** if you have ordered the articles to be included; **Web** when the order is placed through Customer on-line; and **Completed** when the order is done.
10. Click **Save** to save the Order.

Text tab
For writing your offer.

Customer order history tab
Displays previous orders to the customer.

Price matrix tab
Displays articles or services for which the customer is entitled to a discount.

Object tab
Displays the customer's object lists. They can be used if you want to sell consumables or accessories for those objects as well.

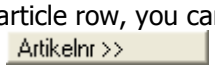
Printouts tab
Displays the printouts for this order.

Forms tab
It contains templates or other documents necessary for your Offer/Order. Those paths are registered in Parameters/Forms.

Invoice tab
Here is where you enter information on a temporary invoice recipient that is not linked to a customer number.

Preliminary calculation tab
Here is where you estimate the cost of work time, travel time and travel distance for the offer/order. Those are transferred to the service order if one is created.

Delete or change article row

If you selected the wrong article row, you can delete it by highlighting it and clicking the icon. Alternatively, you can click 

to open the list and search for the correct article.

Delete Offer/Order

You can delete the entire order by selecting the order number and clicking the icon.

View Offer/Order

There are several ways of viewing registered orders. Below are two ways of viewing an Offer/Order.

If you know the order no:

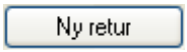
4. Click **Program/Order** and select **Offer/Order,** or click the icon.
5. The **Offer/Order** view is displayed.
6. Click in the **Order no.** field, and enter the order number.
7. Press **TAB** or **F9** to view the selected Offer/Order.

If you do not know the order no:

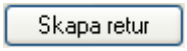
8. Click **Program/Order** and select **Offer/Order,** or click the icon.
9. The **Offer/Order** view is displayed.
10. Click by the **Order no.** field to view the order list.
11. Select status **All** to list all existing Offers/Orders, or select the status assigned to the order.
12. Select the order from the list.
13. Click **Ok**

or double-click the order row.
14. The selected **Offer/Order** is displayed.

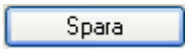
Return order
Here is where you create a return order for the object or articles that should be returned to the supplier.



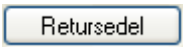
Click **New return** to clear the view and find the correct supplier.



Click **Create return** to register your address.



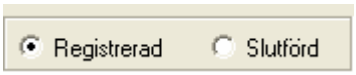
Click **Save** to save the changes.



Click **Return slip** to print or preview the return slip.

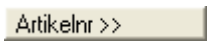
Click **Close** to exit the Return registration view**.**

Click **Generate return no**. if you do not have a return number from the supplier.



Set the status for the return order by ticking Registered or Completed.

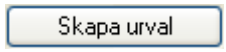
Register return order

1. Click **Program** in the menu bar and go to **Order/Return order**.
2. Click **New return**
3. Enter **return number** if you use a supplier series or click **Generate return no.** to create a serial number.
4. Enter **contact**, **date** and other information.
5. Select s**upplier** by opening the list via the prompt to find the supplier, select it and click **Ok**.
6. Click **Create return** to register your, or the customer's, address information for the supplier to know where to send the replacements.
7. Find the article to be returned in the article directory by clicking  or Description in the Article field and open the list. Find the correct article and click **Ok**.
8. Ensure that you have the correct article and quantity.
9. Click **Return slip** to preview or print the return slip to send the articles to the supplier.
10. Click **Save** to save the return order.

Complete return order

1. Click **Program** in the menu bar and go to **Order/Return order**.
2. Enter the return number and press **F9** to retrieve the order from the database, or click the prompt by the **Return no.** field to view the order list, select the correct return order and click **Ok**.
3. When you receive the replacement parts from the supplier you fill in the **Completed date** and **Sign**. fields.
4. Tick the **Completed** checkbox and click **Save** to save your return order.

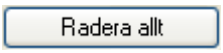
Base order, consumption
Base order can generate consumption orders structured like a schedule, by retrieving information about consumption from the object card. On the Settings tab on the object card, the Base order field must be registered, and in the Price matrix field, articles must be selected as well as the month(s) in which to generate them.



After making your selection in the filter fields, click **Create selection** to view it before creating the base order.

Click **Print** to preview or print the selection.

Click **Create base order** when you are done. Those will be registered in the consumption order queue.



Click **Erase all** if you are not satisfied with your selection and want to make a new one.

Click **Close** to exit the Base order consumption view.

Click in the status field and select the status of the base order.
R= Registered or C= Completed.

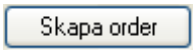
Create base order, consumption

1. Click **Program** in the menu bar and select **Order/Base order consumption**.
2. Make your selection in the **Filter fields**.
3. Assign a **Status** to the base orders.
4. Click **Create selection** to view the selection you made.
5. Click **Print** to preview or print the selection.
6. Click **Create base order** when you are done. Those will be placed in the consumption order queue.
7. Click **Close** to exit the Base order consumption view.

Interval order, consumption
In Interval order, consumption, you create consumption orders in fixed intervals.

After making your selection in the filter fields, click **Create selection** to view it before creating the interval order, consumption.

Click **Print** to preview or print the selection.



Click **Create order** when you are done. Those will be registered in the consumption order queue.

Click **Erase all** if you are unsatisfied with your selection and want to make a new one.

Click **Close** to exit the Interval order consumption view.

Tick the month(s) in which to create the order interval.

Create interval order, consumption

1. Click **Program** in the menu bar and select **Order/Interval order, consumption**.
2. Tick the **month(s)** in ”Select interval order base order (month)”.
3. Make your selection in the **Filter fields**.
4. Click **Create selection** to view the selection you made.
5. Click **Print** to preview or print the selection.
6. Click **Create order** when you are done. Those will be placed in the consumption order queue.
7. Click **Close** to exit the Interval order consumption view.

Contracts

The tab **Contracts** include **Contractual invoicing**, **Counter registration** and **Unit package**. Those are tools for invoicing the customer's service contract.

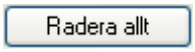
Contractual invoicing

Here, you invoice your advance contracts by making the correct selection.

After selecting the objects to invoice in the form of debit period, customer name, etc., click **Create selection** to preview the invoice.

Click **Print selection** to print the preview.

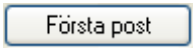
Click **Invoice** when you have ensured the selection is correct.



Click **Erase all** to clear the selection and make a new one.

Click **Update** to save without losing information in the view.

Click **Close** to save the Contractual invoicing view.



Click **First item** to go to the first row of the selection.

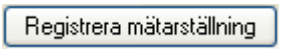
Click **Last item** to go to the last row of the selection.

Contractual invoicing.

1. Click **Program**, select **Contracts** and then **Contractual invoicing**
2. Click in the **Select debit period** field and enter/retrieve the desired debit period, e.g. Q1.
3. Click the letter above the period to transfer the dates to the date fields, or click in the **From date** field and enter a starting date for the period, e.g. 2005-01-01 for Q1 and click in the **To date** field and enter a end date for the period, e.g. 2005-03-31.
4. Click **Create selection**, and the system will search the object directory and display all objects with a service fee within that period. In addition to the service fee and/or on-call fee, the search engine includes any fees entered on the Fees tab.
5. Ensure that everything is correct.
6. Click **Print selection** to print. This is used for matching against the invoices.
7. Click **Invoice** when you are done. Invoices are created and sent to the business system if it is connected to WinServ. If there is no business system, the invoices are printed via Reports/Invoicing.
8. Click **Close** to exit the view.

Counter registration
When you receive the report cards, they must be registered in order for you to be able to invoice the customer for the quantity copied during the period. This is done in Counter registration.

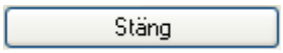
Click **New registration** to invoice an object.



Click **Register counter** or press **F6** to open the lower fields for registration.

Click **Create invoice basis** to invoice.

Click **Clear field** to clear the selected fields and replace the information.



Click **Close** to exit the Counter registration view.

Click **Open** to change the quantity in the contract, e.g. if a customer fails to submit the counter reading for one quarter, you need to change the quantity to allow for six months instead. This eliminates the need to make temporary changes to the object card.

Counter registration

1. Click **Program**, select **Contracts** and then **Counter registration**
2. Click **New registration**
3. Click in the **Object no.** field and enter/retrieve the object.
4. Press **Enter** or **F9,** or click **Register counter**.
5. The **Read** field is selected and you can enter the reported counter reading and press **TAB**. The model determines which field is selected.
6. Fill in **Read date** and press **TAB.**
7. Fill in **Read by** and click **Create invoice basis.** Invoices are created and sent to the business system if it is connected to WinServ. If there is no business system, the invoices are printed via Reports/Invoicing.
8. Click **Close** to exit the view.

Unit package
This is a contract regulating the customer's purchase of consumables and toners necessary for an object's service interval.

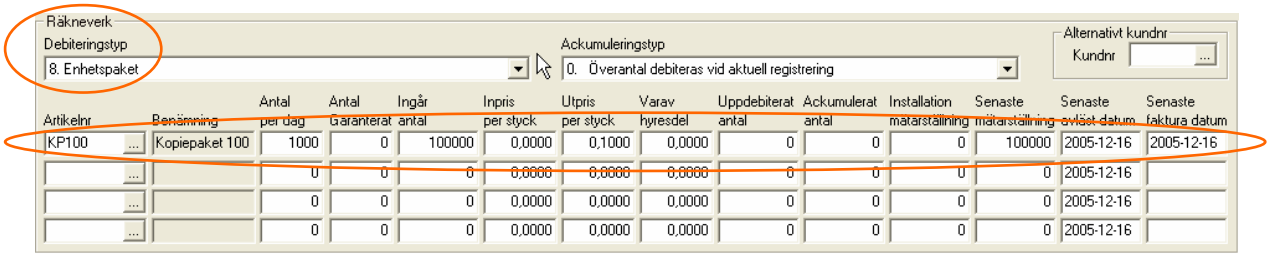
Click **Create order** to invoice a unit package.

Click **Close** to exit the Unit package view.

Create Unit package

1. Click **Program**, select **Contracts** and then **Unit package**
2. Click in the **Object no.** field and enter/retrieve the object.
3. Click in the **Orderer** field, enter the name of the orderer and press **TAB**. The program proposes an Operator it one is registered on the object card.
4. In the **Package** field, enter the number of copies, as well as Order qty, the customer requires, and press **TAB**.
5. Enter the counter reading for the object in the **Counter** field and press **TAB**.
6. Enter the date in the **Present order date** field and press **TAB**.
7. Fill in **Our contact** and press **TAB**.
8. Click **Create order** to invoice.
9. Click **Close** to exit the view.

In order to use the unit package, you need certain settings on the object card, as per below.
Create and select Debit type Unit package.
Create and select Article for the Unit package.
The next package will be debited by the technician when a customer requests Maintenance service.
When the technician reports the service order, he is asked if a new unit package should be invoiced.

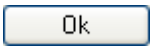


Service

The **Service** tab includes **Group dispatch**, **Work schedule**, **PM service call**, **Interval service**, **Discussion group**, **Service calendar** and **Insert global message**.

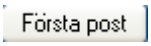
Group dispatch

On the **Service/Group dispatch** tab you can switch service orders from one queue to another and also dispatch them to a specific technician.

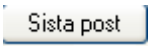


Click **Ok** to make your selection.

Click **Close** to exit the Group dispatch view.



Click **First item** to go to the first row of the group dispatch selection.



Click **Last item** to go to the last row of the group dispatch selection.

Click **Service order** to print the dispatched service orders.

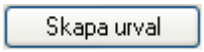
Group dispatch service order

1. Click **Program** in the menu bar and select **Service/Group dispatch**.
2. Click and select the queue from which to dispatch in **Select order status**.
3. Click and select the queue you want to dispatch to, in **Select new order status**.
4. Click and select **Sort order** to sort the service orders for planning purposes.
5. Click in the **Call type, District, Region, Customer no., Technician, Object type** or **Model type** to lock the list after making the selection.
6. Click in the **Insert technician** and enter/retrieve the desired technician for the service order.
7. Tick the **Assign** checkbox in the list for the object whose status you want to change.
8. Click **Ok** to make your selection.
9. Click **Close** to exit the Group dispatch service order view.

Print group dispatched service orders

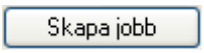
1. Click **Program** in the menu bar and select **Service/Group dispatch**.
2. Click **Service order** to print the service order.
3. Select the fields to print.
4. Select the queue to print in **Print call with status**.
5. Tick the **Extra document** checkboxes to include those documents when printing.
6. Use the checkboxes in **Select printout** to print the service orders directly or preview them before printing.
7. Click **Ok** to make your selection.
8. Click **Close** the exit the Group dispatch Service order.

Work schedule
In Work schedule you can create service orders by pre-determined dates. This requires a registered work schedule on the object card.

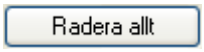


Click **Create selection** when you have made your selection and want to preview the list.

Click **Print** to print the selection.



Click **Create call** when you are satisfied with the selection and want to create a service order from it.



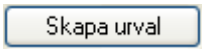
Click **Erase all** if you are not satisfied with the selection.

Click **Close** to exit the Work schedule view.

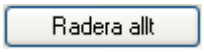
Create work schedule

1. Click **Program** in the menu bar and select **Service/Work schedule**.
2. Make your selection in the form of **Date**, **Object no.**. etc.
3. Fill in the **Service days** field. 1 to 20 for workdays or, for example, 1 to 31 for days of the month.
4. Select **Call type**, **Status**, **Priority**. Those are compulsory.
5. Also select **Task code**, **Technician** and **Time** if you want to include them in the service order.
6. Click **Create selection** and preview the list.
7. Click **Create call** to create a service order from the selection. Those are placed in **Booked calls.**
8. Click **Close** to exit the Work schedule view.

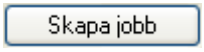
PM Order
Here is where you create PM (Pre-maintenance) service calls in the form of service orders. Those require registration of No. of days and Qty on the model card or object card.



Click **Create selection** when you have made your selection and want to preview the list.

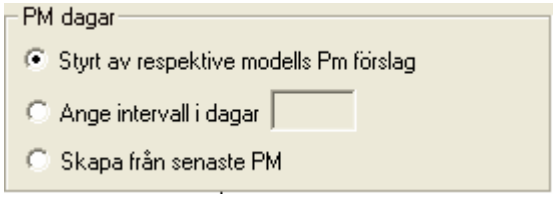


Click **Erase all** if you are not satisfied with the selection.

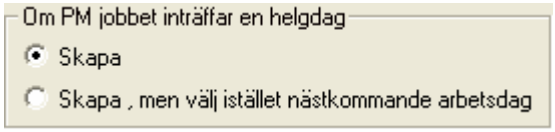


Click **Create call** when you are satisfied with the selection and want to create a PM service call from it.

Click **Close** to exit the Create PM service call view.



In the **PM days** field you select the way in which to create the service call.

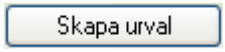


In the field **If PM falls on a holiday** you can choose whether to create the service call for a holiday or not.

Create PM service call

1. Click **Program** in the menu bar and select **Service/PM service call**.
2. Make your selection in the form of **Date**, **Object no.**. etc.
3. Select **Call type**, **Status**, **Priority, Task code**. This information is compulsory.
4. Also select **Technician** and **Time** if you want to include them in the service order.
5. Select the way in which to create the PM service call in the **PM days** field.
6. Select the way in which to create PM service calls concerning service on holidays or not, in the field **If PM falls on a holiday.**
7. Click **Create selection** and preview the list.
8. Click **Create call** to create a service order from the selection. Those are placed in **Incoming service calls.**
9. Click **Close** to exit the Work schedule view.

Interval service
I Interval service you can create service orders in four different ways. Some of which require that you registered information on the object card.



Click **Create selection** when you have made your selection and want to preview the list.

Click **Print selection** to print the selection.

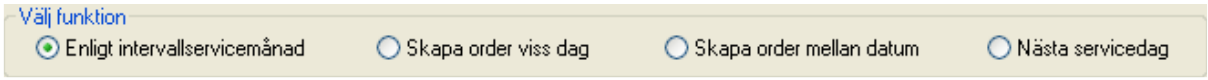
Click **Printout confirmation** to send a confirmation of the interval service to the customer.

Click **Erase all** if you are not satisfied with the selection.

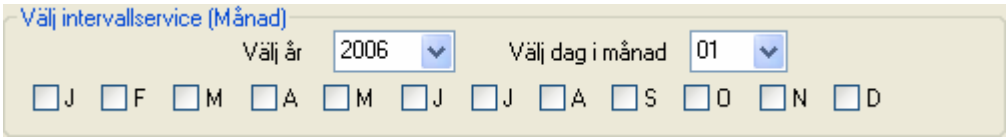
Click **Create order** when you are satisfied with the selection and want to create a service order from it.

Click **Service order** to print a service order. A filter appears where you can select the desired printouts.

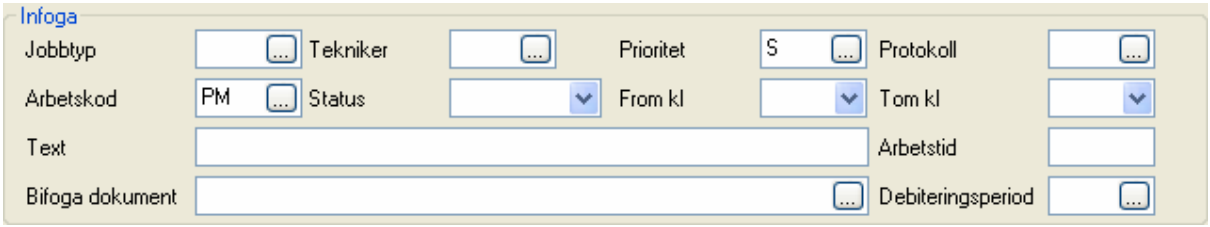
Click **Close** to exit the Interval service view.



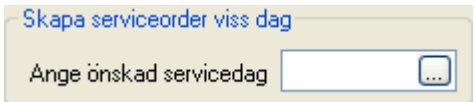
Select the function you want to use when creating your interval service orders (see below).



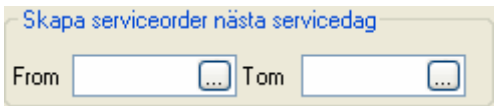
Select the year or month in which to create interval service orders. This period can be registered on the object card, enabling you to create service orders on the first day of the selected month(s).



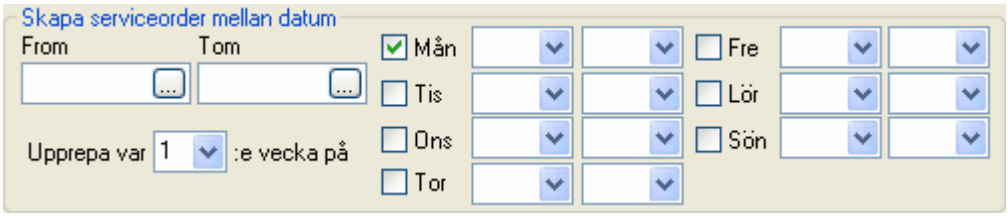
Here, you select the Status and Priority for the interval service orders. You can also select Call type, Technician, Task code, Protocol, Time, etc.



Click **Create order for specific date** in the function field, to enable this function.
Select the date on which to create the interval service order.



Click **Next service date** in the function field to enable this function. Select the date interval you want WinServ to check regarding the pre-determined service date on the object card.

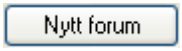


Click **Create order between dates** in the function field, to enable this function. Select the date interval for which to create the service order, as well as days and weeks.

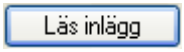
Create Interval service

1. Click **Program** in the menu bar and select **Service/Interval service**.
2. In the Function field, select the function in which to create the interval service.
3. Make your selection in the form of **Date**, **Object no.**, etc.
4. Select **Call type**, **Status**, **Priority, Task code**. Those are compulsory.
5. Also select **Technician, Time** or **Protocol** if you want to include them in the service order.
6. If you selected **Interval service month**, the function creates service orders for the month and year you registered on the object card when creating the service contract.
7. If you selected **Create order for specific date**, the function creates service orders for the selected service date. You can base your selection on Customer no., Object no., etc.
8. If you selected **Create service order next service date**, the function creates service orders on the date you selected as the annual service date on the object card.
9. If you selected **Create service order between dates** the function creates service orders on the dates and weeks you selected.
10. Click **Create selection** and preview the list.
11. Click **Create order** to create service orders from the selection. Those are placed in **Incoming service calls.**
12. Click **Close** to exit the Work schedule view.

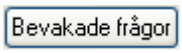
Discussion group
In the Discussion group, you create a forum for technicians. The idea is to make it easier for a technician to pass on his/her knowledge in order for the work to be performed more easily. For example, you can create an information bank.



Click **New discussion group** to create a new forum.



Click **Read post** to read what another technician has posted.



Click **Monitored issues** to follow up on specific issues.

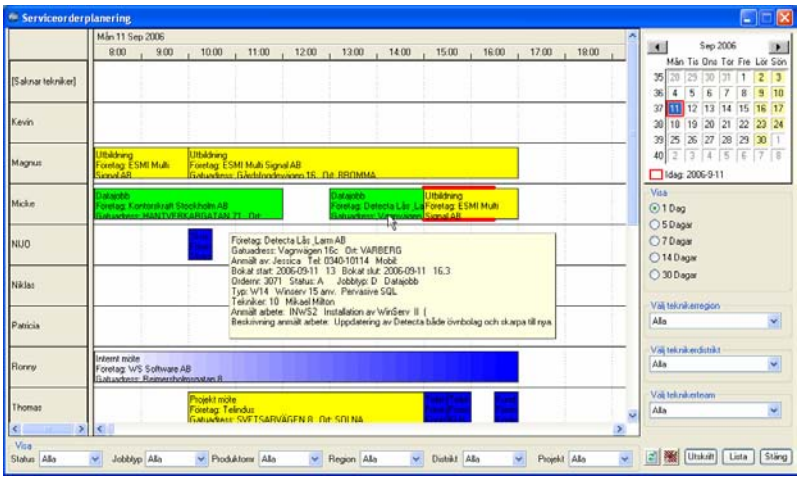
Click **Close** to exit the Discussion group view.

Create discussion group

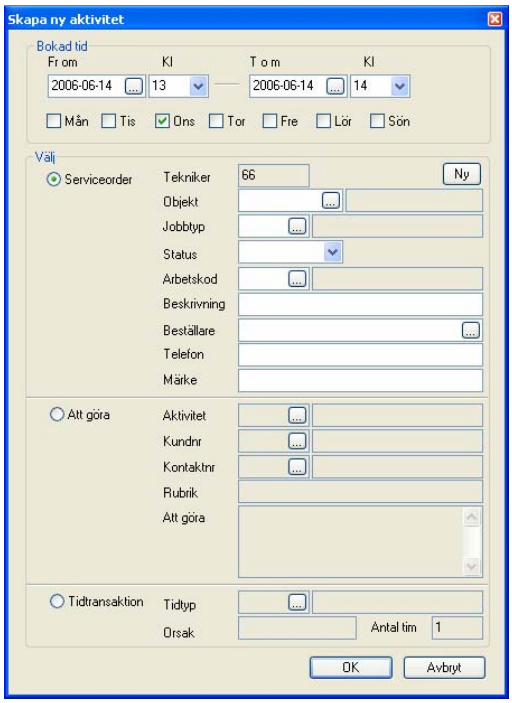
1. Click **Program** in the menu bar and select **Service/Discussion group**.
2. Click **New discussion group** to create a new forum. Enter a name for the discussion group.
3. Click **Read contribution** to read the responses from other technicians.
4. Click **New contribution** to comment or ask a new question.
5. Click **Monitored issues** to follow up on specific issues.
6. Click **Read answer** to read the responses from other technicians.
7. Click **New answer** to respond to someone else's contribution.
8. Click **Monitor** to prioritise a certain issue.
9. Click **Close** to exit the view.

Service calendar

Use drag-and-drop in the Service calendar to easily assign the various service orders to technicians and also to book several technicians for the same service order.



1. Select a date for the service order planning, or select the number of days to display in the **View** field.
2. Select a service order from No technician assigned, and drag-and-drop the service order to a technician.
3. If you want to edit the service order, **double-click** to open the service order.
4. You can also select your service orders from the drop-down list in the **Selection** field.
5. You can also use the drop-down lists, Technician's region, Technician's district and Technician's team.
6. Click **Print** to print a screen dump of the service order planning.



Create Service order via the calendar

1. Use drag-and-drop to select the time and date in which to create the Service order. Select the date(s) and day(s) on which to create your Service orders.
2. Tick the **Service order** check box.
3. Select **Object** by searching and retrieving it from the object directory
4. Select **Call type** by searching and retrieving it from the list.
5. Select **Task code** by searching and retrieving it from the list.
6. Describe the problem in the **Description** field.
7. Fill in the **Orderer** field, or retrieve it from the list.
8. Enter phone number in the **Telephone** field.
9. Enter the **Order mark** field to mark the invoice.
10. Click **OK** to create the service order.

Create ToDo via the calendar

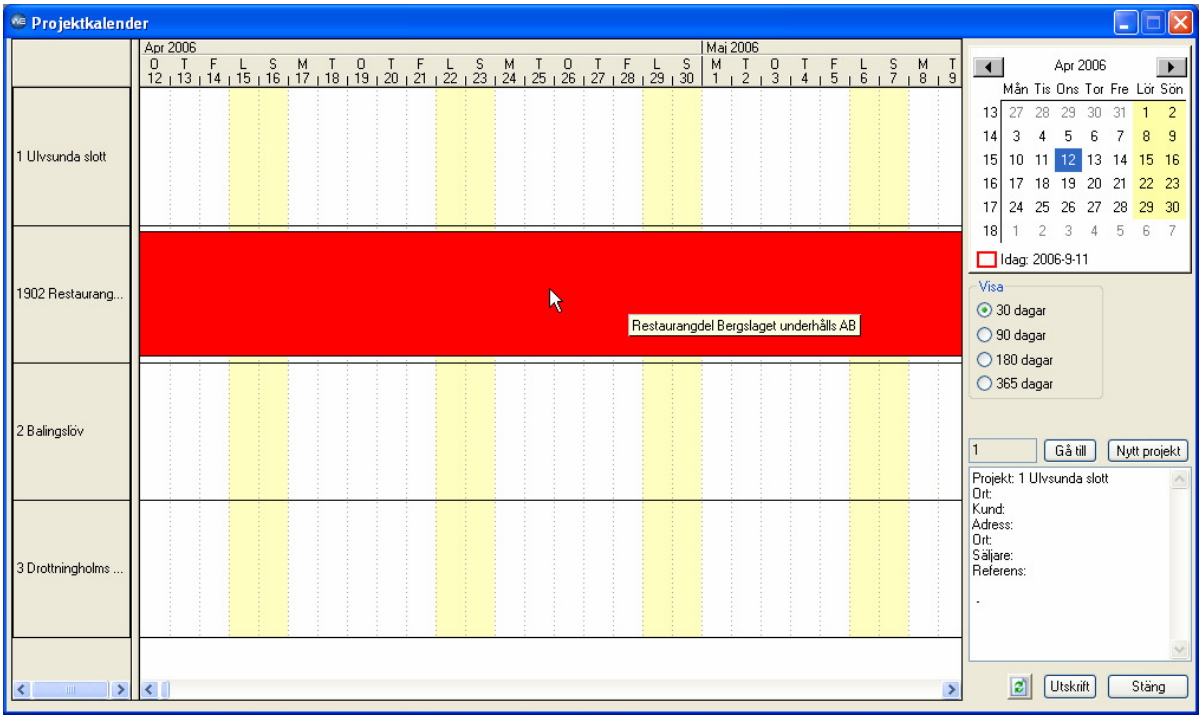
1. See points 1-2 above.
2. Tick the **ToDo** checkbox.
3. Select **Activity** by searching and retrieving it from the list.
4. Select **Customer no.** by searching and retrieving it from the list.
5. Select **Header** and enter what needs to be done in the **ToDo** field.
6. Click **OK** to create ToDo.

Create absence via the calendar

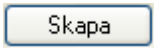
1. See points 1-2 above.
2. Tick the **Absent** check box.
3. Select **Time type** by searching and retrieving it from the list.
4. Enter reason in the **Reason** field.
5. Click **OK** to create the Absence.

Project calendar

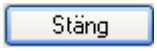
This provides an overview of the ongoing projects during a period in order to plan upcoming projects.



Insert global message
This feature enables you to insert a message to the technician on a service order. Use filters to link them to certain projects.

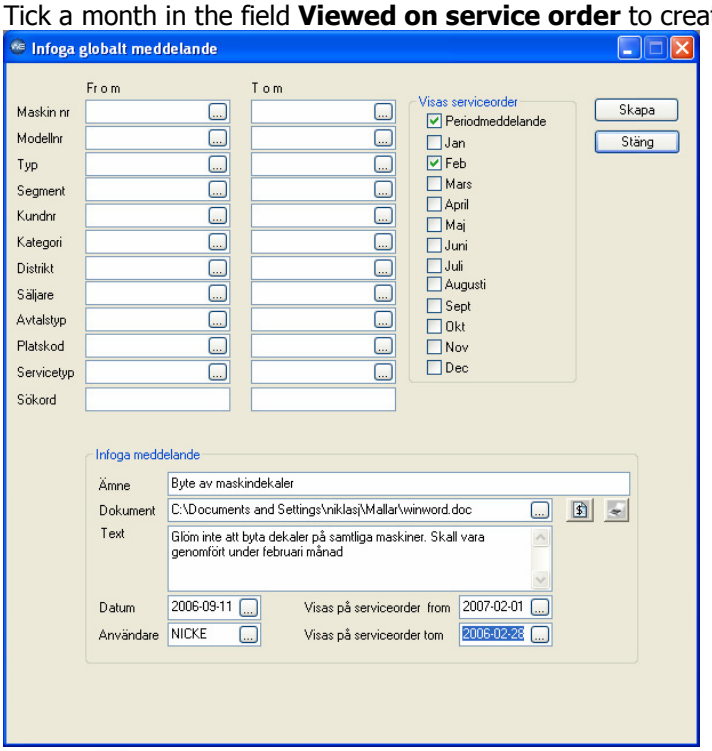


Click **Create** when you have made your selection and want to insert a message on the object cards.



Click **Close** to exit the view.

Tick a month in the field **Viewed on service order** to create a periodic message.



Fill in the fields Subject, Text or link a stored document to **Insert message**.

Create Insert global message

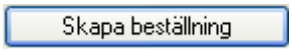
1. Click **Program** in the menu bar and select **Service/Insert global message**.
2. Select the filters you need to create a message on the object cards ///och sin tur felanmälan and for service orders, e.g. model no., segment, etc.
3. Click **Periodic message** and select the months in which to create the recurring message.
4. Click Insert message and enter **Subject**.
5. Click **Document** if you want to link a stored document.
6. Click **Text** and enter the message text.
7. Click in the **Date** field to change the date.
8. Click in the **User** field to change the user.
9. Click in the **Viewed on service order from** field if you do not want the message to be displayed until a certain date.
10. Click in the **Viewed on service order to** field if you only want the message to be displayed until a certain date.
11. Click **Create** when you have made your selection and want to insert a message on the object cards.

Stock

In WinServ, you can create Purchase orders, see Technician stock, where you also assign **OP** Order point and **OQ** Ordered Quantity. Create Maintenance for technician stock, Removal of stock and Indeliveries and Inventory.

Purchase order

Click **New purchase order** or press **Enter** to clear the Purchase order view and open all fields for a new order.



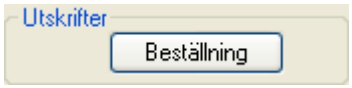
Click **Create purchase order** or press **Enter** to assign an order number and to complete the purchase order with name and article number, etc.

Click **Create order basis** if you use **OP** Order Points and **OQ** Ordered Quantity, and the function creates a purchase order for that supplier.

Click **Mark for indelivery** to indeliver all.

Click **Unmark for indelivery** to unmark the articles again.

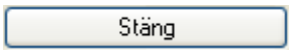
Click **Indelivery** to indeliver the articles previously ordered.



Click **Purchase order** to order articles from the supplier. The purchase order can be printed. It can also be sent as a fax or e-mail through WinServ.

You select Registered when placing the order. When the parts arrive, click **Indelivery** to place the articles in the right stock; then select Completed and click **Save**.

Click **Save** to save the information.



Click **Close** to exit the Purchase order view.

New purchase order

10. Click **Program** in the menu bar and select **Service/Purchase orders**.
11. Click **New order** or press **Enter**.
12. Click in the **Supplier** field and enter a supplier number. Alternatively, select a supplier from the list.
13. Click in the **Supplier contact** field and register a contact at the supplier's.
14. Click **Create purchase order** or press **Enter** to assign an order number and to complete the purchase order with name and article number, etc.
15. Click **Purchase order** and send the order to a supplier in the way you desire.
16. Tick the status box **Ordered** to keep track of what has been done.
17. Click **Save** to save the purchase order while waiting for the goods to arrive.
18. When the goods are delivered, go to Program/Stock/Purchase order and open the purchase order, either by using the prompt [...] and finding the order, or by entering the order number and pressing **F9**.

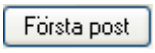
19. Click in the article row and enter the quantity received, and tick the Indelivery box. Continue until all the article rows have been completed.
20. Click **Indelivery** to register the articles in the stock.
21. Tick **Completed** in the status field.
22. Click **Save.** The purchase order and indelivery are now completed.

Delete purchase order

9. Click **Program** in the menu bar and select **Service/Purchase orders**.
10. Click in the **Purchase order no.** field and enter/retrieve the purchase order to be deleted.
11. Click **Delete**.
12. You are asked to confirm, click **Yes**.
13. The purchase order is deleted and the view cleared.
14. Click **Close** to exit the window.

Technician stock

Lists the stock of a selected technician. You can also enter new **OPs** Order Points, i.e. a minimum stock level. If it falls below that level, you will be asked to create a new purchase order (Reports/Stock/Purchase order proposal).
OQ Order Quantity tells you how many to order for every purchase order and **Max** limits the quantity to a certain level. You can also add aisle and shelf.



Click **First item** to see the first item in the technician stock.

Click **Last item** to see the last item in the technician stock.

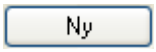
Click **Edit** to change location or order point, etc.

Click **Print** to print the technician stock.

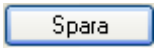
Click **Close** to exit the Technician stock view.

Technician stock removal

Here is where you move articles between stocks.



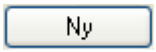
Click **New** to clear the view for a new registration.



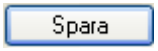
Click **Save** to save the changes you made.

Click **Close** to exit the Technician stock removal view.

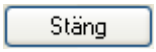
Indelivery of goods
This feature is used for creating a manual indelivery of an article.
Select technician stock, article number and quantity, etc. Click **Save** to carry out the transaction.



Click **New** to clear the view for a new registration.

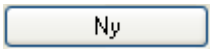


Click **Save** to save the changes you made.



Click **Close** to exit the Indelivery view.

Inventory
After inventory, you enter the deviating values here.



Click **New** to clear the view for a new registration.

Click **Save** to save the changes you made.

Click **Reset before registration** to re-register your stock for any reason.

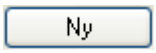
Click **Close** to exit the Inventory view.

Sale support

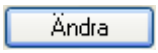
The **Sale support** tab includes **ToDo**, **Create ToDo, Sale forecast**, C**alendar**, **Customer survey**, **Customer survey questions, Customer survey e-mail** and **Customer survey transactions**. Those are the applications used daily by the sales reps.

Todo

Allows you to create, edit and read your ToDo list. The sales rep's daily information is collected here.



Click **New** to create a new ToDo item.



Click **Edit** to edit an existing ToDo item.

Click **Contact** to open the contact card linked to your ToDo list.

Click **Customer** to open the customer card linked to your ToDo list.

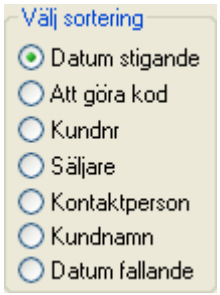
Click **Close** to exit the ToDo view.

Click **First item** to go to the first row of the ToDo list.

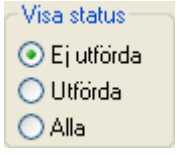
Click **Last item** to go to the last row of the ToDo list.

Select the ToDo items to view: the selected user, a group or all.

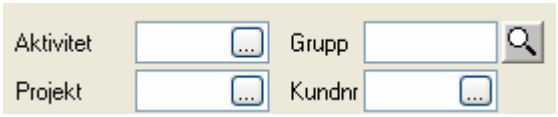
Select the period you want to view.



Select the desired sort order.



Select the status you want to view: not completed, completed and saved or all.



Use the lists in the fields to filter

Use this button to create recurring ToDo items.

Use this button to restore selections.

Use this button to restore all the fields in the list.

New ToDo

23. Click **Program** in the menu bar and select **Sale support/ToDo**, or click the icon.
24. Click **New**
25. Click the prompt and select the **User** for whom to create a ToDo item. The logged in user is pre-selected.
26. Click in the **Date** field to set date and time for the ToDo item.
27. Click in the **Sales rep** field and select from the list.
28. Click in the **Activity** field and select an activity for the ToDo item.
29. Enter the desired information in the fields, **Header**, **Location** and **ToDo**.
30. Click in the **Customer no.** field and select the customer.
31. Click in the **Contact** field and select the contact.
32. Click **Save** to save and exit.

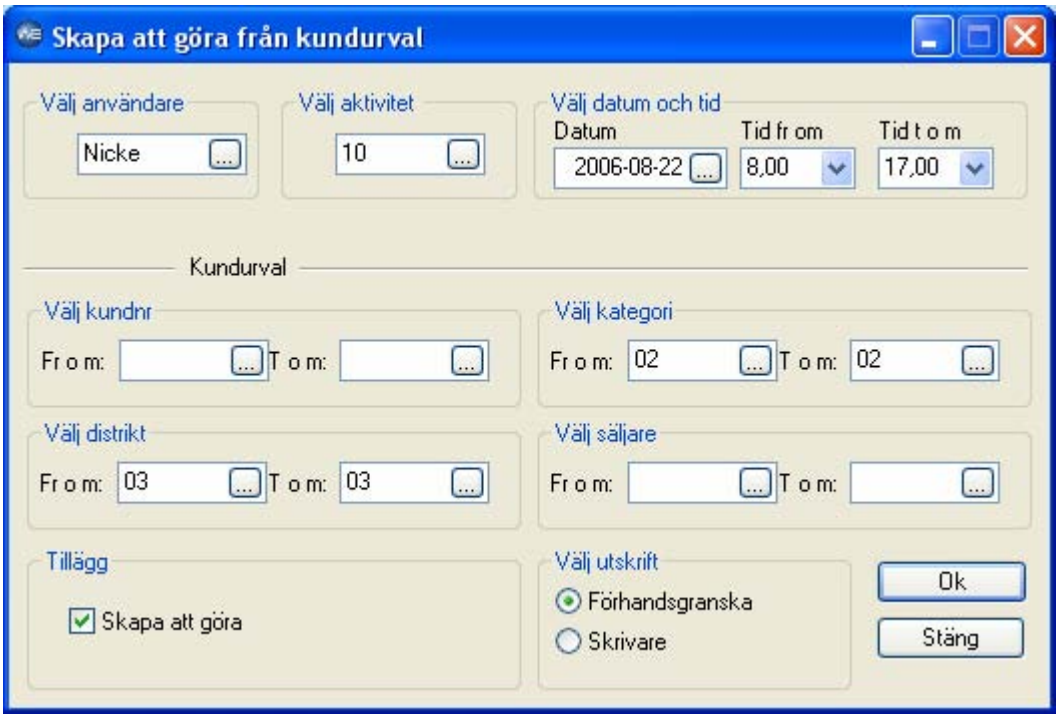
Carrying out ToDo

1. Click **Program** in the menu bar and select **Sale support/ToDo**, or click the icon.
2. Select the ToDo item you want to carry out and click **Edit.** Enter the actions you performed for the contact, in the Results field.
3. Click in the fields Travel time, Travel distance, Per diem and Expenses to report those through WinServ.
4. Tick **Completed** and click **Save**. A new ToDo item appears and you continue the editing of contacts and customers.

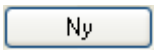
Delete ToDo

15. Click **Program** in the menu bar and select **Sale support/ToDo**, or click the icon.
16. Select the ToDo item you want to delete and click **Edit** or double-click the row**.**
17. Click **Erase**.

Create Todo
Here, you can create several ToDo items with certain activities for all customers with a certain category, sales rep, district or customer number. This enables you to create several activities for all your sales reps at the same time.



Sale forecast
Here is where the sales rep estimates what the transaction may bring in, both in terms of turnover, profit and profit probability, in order for the sales manager and management to be able to plan ahead.

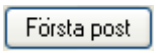


Click **New** to create a new sale forecast.

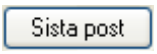
Click **Edit** to edit an existing sale forecast.

Click **Customer** to open the sale forecast's customer card.

Click **Close** to exit the Sale forecast view.

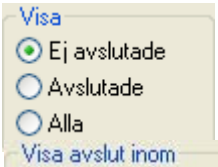


Click **First item** to go to the first row of the Sale forecasts list.



Click **Last item** to go to the last row of the list.

Select the sale forecast to view. Selected user, a group or all.



Select the status you want to view: not completed, completed and saved or all.

Select the period of forecasts to view.

Select a sort order for the sale forecasts.

New Sale forecast

1. Click **Program** in the menu bar and select **Sale support/Sale forecast**, or click the icon.
2. Click **New**
3. Click the prompt and select the **User** for whom to create a sale forecast. The logged in user is pre-selected
4. Click the prompt in the **Customer no.** field to select a customer for whom to make a sale forecast.
5. Click in the **Sales rep** field and select from the list. The logged in user is pre-selected
6. Click in the **Contact** field and select a contact for the sale forecast.
7. Click in the **Existing product** field and enter the desired information.
8. Click in the **Date** field. Select the correct date.
9. Click in the **Completion date** field and selected the estimated completion date.
10. Click in the **Chance %** field and weigh the chances of bringing in the business.
11. Click in the **Product area** field and use the prompt to select a product area for the forecast.
12. Fill in the fields, **New product**, **Qty** and **Competitors**.
13. Click in the **Type** field and select a financing type from the drop-down list
14. Enter the period of the financing proposal in the **Contract period** field.
15. Fill in the fields, **Turnover** and **Profit**. **Profit probability** is calculated on the basis of the weighting in **Chance%.**
16. Click in the **Notes** field if you want to add a comment about the sale forecast.
17. Click in the **Document** field if you want to link a document to the forecast. Browse your way to the location of the document by clicking the prompt
18. Click **Save** to save and exit.

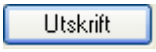
Complete Sale forecast

1. Click **Program** in the menu bar and select **Sale support/Sale forecast**, or click the icon.
2. Select the forecast you want to complete and click **Edit.**
3. Click in the **Results** field and enter the achieved result.
4. Click in the **Reason** field and enter the reason for that result.
5. Click in the **Project** field to link the sale forecast to a project.
6. Tick any of the checkboxes, **Ended customer relation**, **Order confirmation** or **Order** for statistics and follow-up.
7. Tick the **Completed** checkbox and click **Save**.

Delete Sale forecast

1. Click **Program** in the menu bar and select **Sale support/Sale forecast**, or click the icon.
2. Select the forecast you want to delete and click **Edit**, or double-click the row.
3. Click **Erase**.

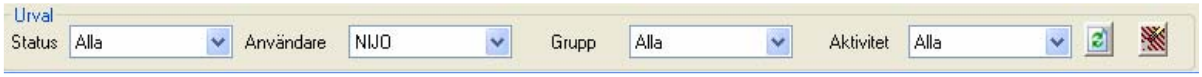
Calendar
In the calendar, you can block periods of the day in order to keep track of when you have appointments.



Click **Print** to make a printout of the calendar.

Click **Close** to exit the calendar view.

Click the icon to get a map to the customer's address if he is registered in the calendar.



Use the drop-down lists to make selections in the calendar. You can view Not completed, Completed and All. You can choose which calendar to view. You can also choose which activity to view, for example All offers.

Make appointment in calendar

1. Click **Program** in the menu bar and select **Sale support/Calendar**, or click the icon.
2. Drag-and-drop to select the item in the calendar.
3. Enter what you want to remember.

4. Press any key.
5. A new ToDo appears.
6. Click in the **User** field and select a user through the prompt. The logged in user is pre-selected.
7. Click in the **Date** field and select date and time for the ToDo item.
8. Click in the **Sales rep** field and select the sales rep concerned. The logged in sales rep number is pre-selected.
9. Click in the **Activity** field and select the desired activity through the prompt.
10. Click in the **Header** field and enter a header for the ToDo item.
11. Click in the **Location** field to describe where the ToDo item will take place.
12. Click in the **ToDo** field and enter the activity.
13. Click the **Customer** field and select a customer through the prompt.
14. Click in the **Contact** field and select the contact the ToDo relates to.
15. Tick the checkbox for **Private** or **Priority** to distinguish your appointments in the calendar.
16. Click **Save** to store the ToDo item in the calendar.

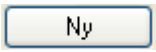
Complete appointment in Calendar

1. Click **Program** in the menu bar and select **Sale support/Calendar**, or click the icon.
2. Double-click the appointment.
3. Click in the **Result** field and enter the result of the ToDo item.
4. Click in the **Document** field to link a document to the ToDo item by browsing your way to the document.
5. Click in the fields **Travel time**, **Travel distance**, **Per diem** and **Expenses** to register those with the ToDo item. This is for invoicing or salary bases.
6. Click in the **Project** field to link the ToDo item to a project.
7. Click in the **From** field to state from whom the ToDo item originated from .
8. Click the **Completed** checkbox.
9. Click **Save** to save the ToDo item.

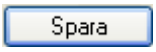
Delete appointment in calendar

1. Click **Program** in the menu bar and select **Sale support/Calendar**, or click the icon.
2. Double-click the appointment.
3. Click **Erase** to delete the ToDo item from the calendar.
4. Confirm delete by clicking **Yes**.

Customer survey
In Customer survey you can make surveys of, for example, what the customer's impression is of your company. Here is where you create the various surveys you want to distribute.



Click **New** to create a new survey.



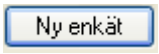
Click **Save** to save the survey.

Click **Close** to exit the Customer survey view.

Create Customer survey

1. Click **Program** in the menu bar and select **Service/Customer survey**.
2. Click **New** to create a new survey.
3. Click in the **Survey no.** field and assign a number to the survey.
4. Use the TAB key to go to the **Name** field and assign a name to it.
5. Use the TAB key to go to the **Date** field and assign a date to the survey.
6. Click **Save** to save the survey.
7. TO create more surveys, repeat steps 1-5.
8. Click **Close** to exit the Customer survey view.

Customer survey questions
In Customer survey questions, you create the actual questionnaire for the survey.

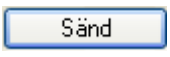


Click **New** to create a new survey.

Click **Close** to exit the Customer survey questions view.

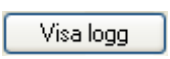
In **Survey no.** you use the prompt to select a customer survey on which to base a questionnaire.

Customer survey E-mail
In Customer survey E-mail, you can e-mail a survey or attached file to selected customers. You choose which customers to send the survey, or the attached file, to by using the filter fields.

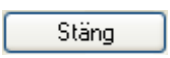


Click **Send** when you have made your selection and want to send the survey or the attached file.

Click **Precount** to se how many recipients the survey is sent to, before sending it.



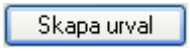
Click **View log** to see whom you have sent to.



Click **Close** to exit the Customer survey questions view.

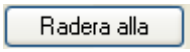
Customer survey transactions
Here is where you create Customer surveys. You also select the recipients for the survey.

Click **New survey** to create a new survey. This is a short-cut to the customer survey described above.



Click **Create selection** to see what your selections have created.

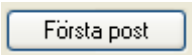
Click **Update** when you like to save and keep the wiev.



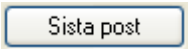
Click **Erase all** to delete the selection you created.

This allows you to create a text file for the selected survey. This text file can be opened in Microsoft Word and linked to documents for labels or letters. The text file is placed in WinServ's temp folder.

Click **Close** to exit the Create customer survey transactions view.

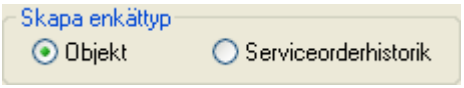


Click **First item** to go to the first row of the selection list.



Click **Last item** to go to the last row of the selection list.

Click **Removal marked** to delete an object in the selection list. Ensure that you tick the **Remove** checkbox for the object before clicking Delete.



Select the **Survey type** you want to create; **Object** for a survey that relates to the object's installation date, and **Service order history** for a survey that relates to dates of the service order history.

Time transactions

In WinServ you can register the time during which you are not working, for example holidays, sick child, sick-leave or training. Salary administrators can print a time report every month and compare it to the employee's attendance records. You can also report time spent on a service order in Time registration service order.

Time registration

Click **New** to create a new sale forecast.

Click **Save** to save the Time registration view.

Click **Close** to exit the Time registration view.

Click the **Excel** button to export time transactions to Excel.

Click **Export** to create a text file from your time transactions. The text file is placed in the folder determined under **System/System parameters/Catalogues**. Usually WinServ/temp.

Click **From-To** to automatically create time transactions between two dates, enter Technician and Time type.

Find the right Time transaction

1. Click **Program** in the menu bar and select **Time registration**.
2. Click in the **Tech no.** field and enter the technician's number and press TAB or F9. You can also click the prompt … and select the number in the list.
3. If you have many technicians to select, you can use the filters, for example District and by ticking the checkboxes Active or Not active in **View technician**.
4. You can also search the fields to find the right technician.
5. When the right technician is selected, click **Ok** to assign the right technician to the time card.

New time registration

1. Click **Program** in the menu bar and select **Time registration**.
2. Click **New Time trans.** to create a new sale time transaction.
3. Click **From-To** to create several time transactions.
4. Click in the **Tech no.** and enter the requested technician's number and press TAB or click the prompt … to retrieve the technician's number.
5. Click **Time type** and enter the time type and press **Tab** or **F9**, or click the prompt … and retrieve the time type.
6. Click in the **Date** field and enter/retrieve the requested group as per above.
7. Click in the **Object** field to link the time transaction to an object.
8. Click in the **Travel zone** field to link the time transaction to a travel zone.
9. Click in the fields **From, To** and **No. of hours** to assign a time to the time registration.
10. Click in the fields **Counter, From, To** and **No. of km** to assign a distance to the time registration.
11. Click in the **Reason** field to assign a reason to the time registration.

12. Click in the **Expenses** field if there are expenses linked to the time registration.
13. Click **Save** to save and exit.

Delete Time registration

1. Click **Program** in the menu bar and select **Time registration**.
2. Select the time registration to delete.
3. Click in the menu bar.
4. You are asked to confirm, click **Yes**.
5. The time registration is deleted and the view cleared.
6. Click **Close** to exit the window.

Export time transaction

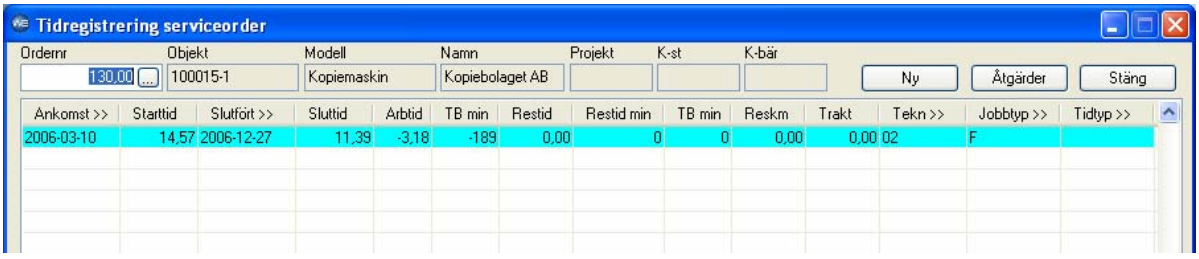
1. Click **Program** in the menu bar and select **Time registration**.
2. Click the **Export** button.
3. This allows you to export time transaction history to the text file TIDTRANS.TXT. The text file is located in the folder chosen for export in **System/System parameters/Folders**.
4. Click **OK** to confirm the export of time transaction history.

Export Time transaction to Excel

1. Click **Program** in the menu bar and select **Time registration**.
2. Click the **Excel** button.
3. This allows you to transfer the time transaction history to MS Excel.

Time registration Service order

This feature is used if you have a long running service order with several technicians and only want to register the times to one service order. The benefit of this is the small amount of administration needed without sacrificing control of technicians and work, in the form of statistics, etc.



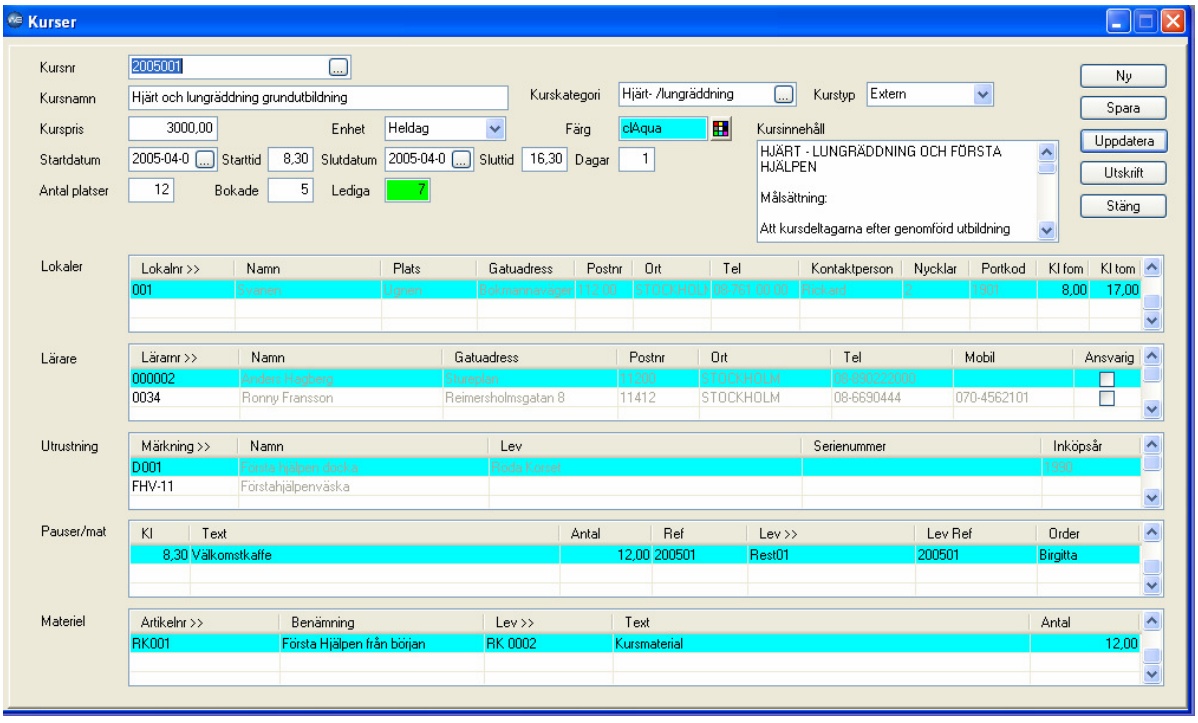
Course booking

Course booking is an optional module for companies that are involved in organising or participating in courses, both internally and externally, and therefore need to keep track of venues, course directors, equipment and bookings, etc.

Courses

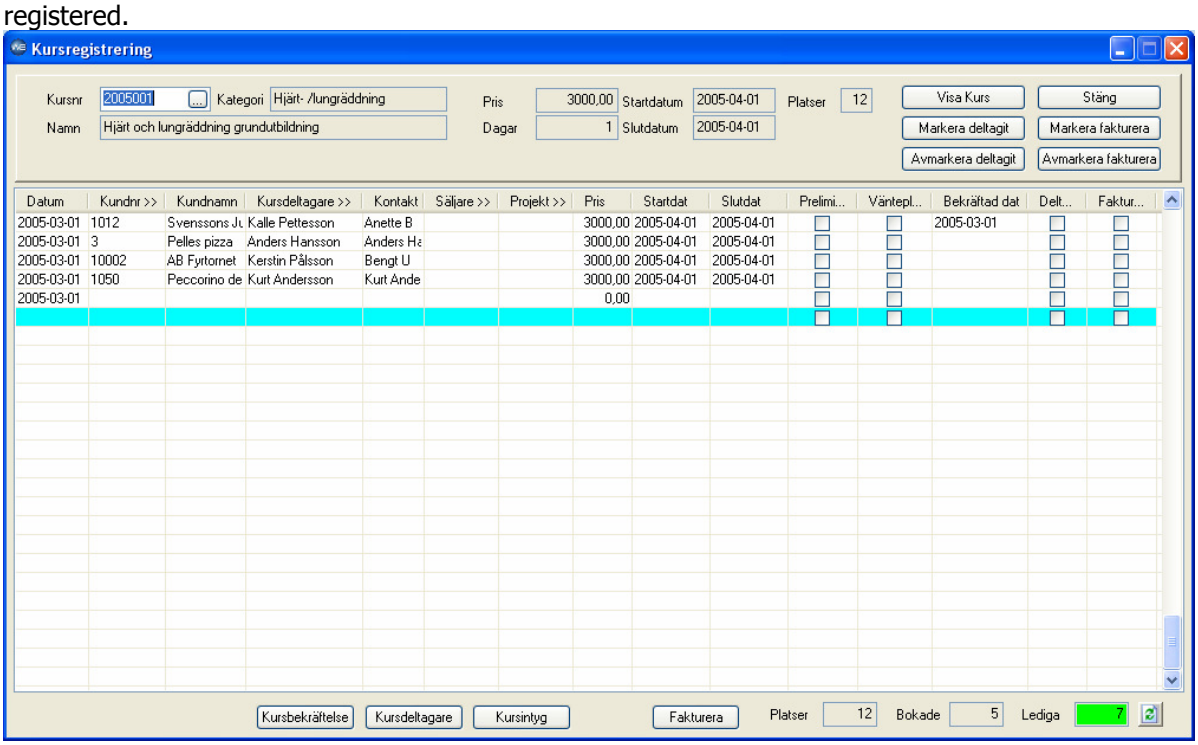
Courses are created as follows.

1. Go to **Program/Course booking system/Courses**.
2. Click **New.**
3. Select or enter **Course no.**, **Course name**, **Course category** and **Course type**.
4. Enter **Course price**, **Unit** and link a **Colour** to the course.
5. Enter **Start** and **End date** and **Time**.
6. Enter **No. of places** and **Course content**.
7. Link the **Location** of the course.
8. Link a **Teacher** to the course.
9. Link the **Equipment** necessary for the course.
10. Link any **Breaks** to take during the course.
11. Link the **Material** necessary for the course.
12. Click **Save.**



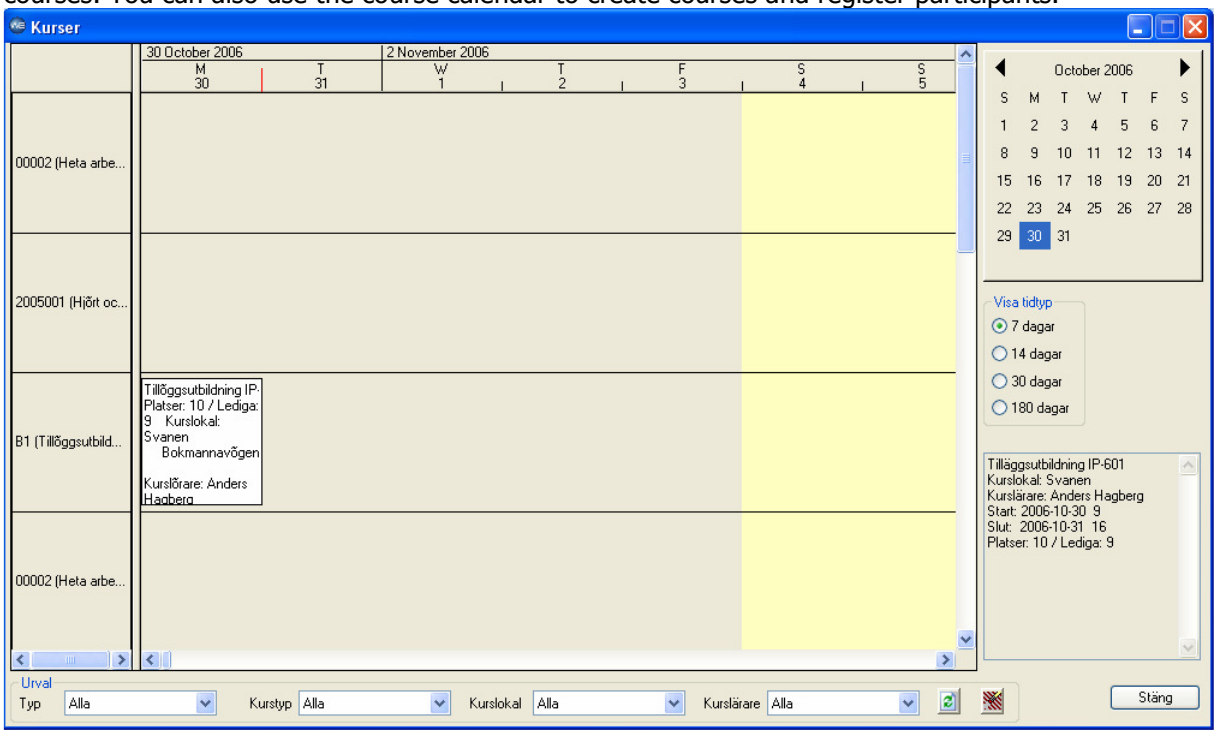
Course booking

Go to **Program/Course booking system/Course bookings**. Here is where the participants are registered.



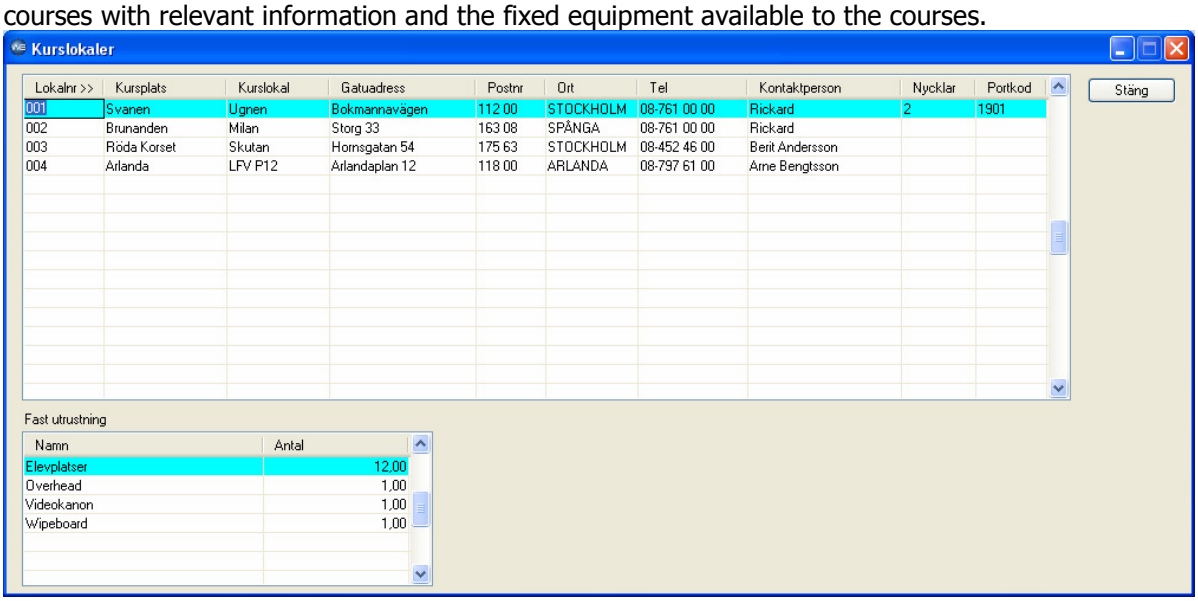
Course calendar

Go to **Program/Course booking system/Course calendar**. Here is where you view and plan the courses. You can also use the course calendar to create courses and register participants.



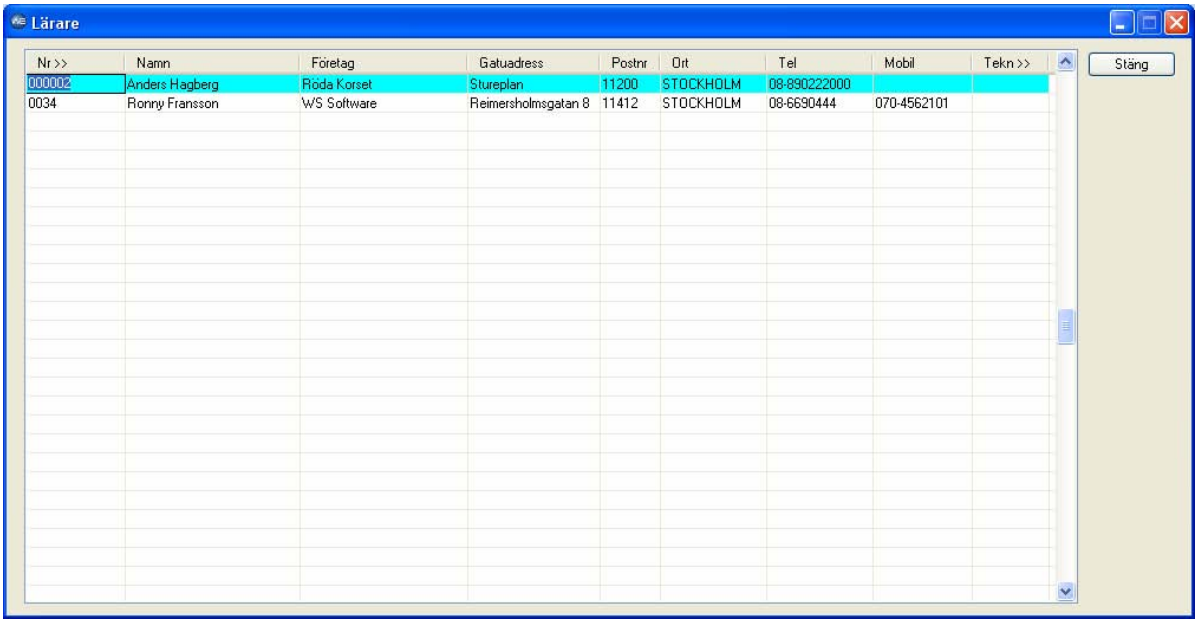
Locations

Go to **Program/Course booking system/Locations**. Here is where you list the venues of the courses with relevant information and the fixed equipment available to the courses.

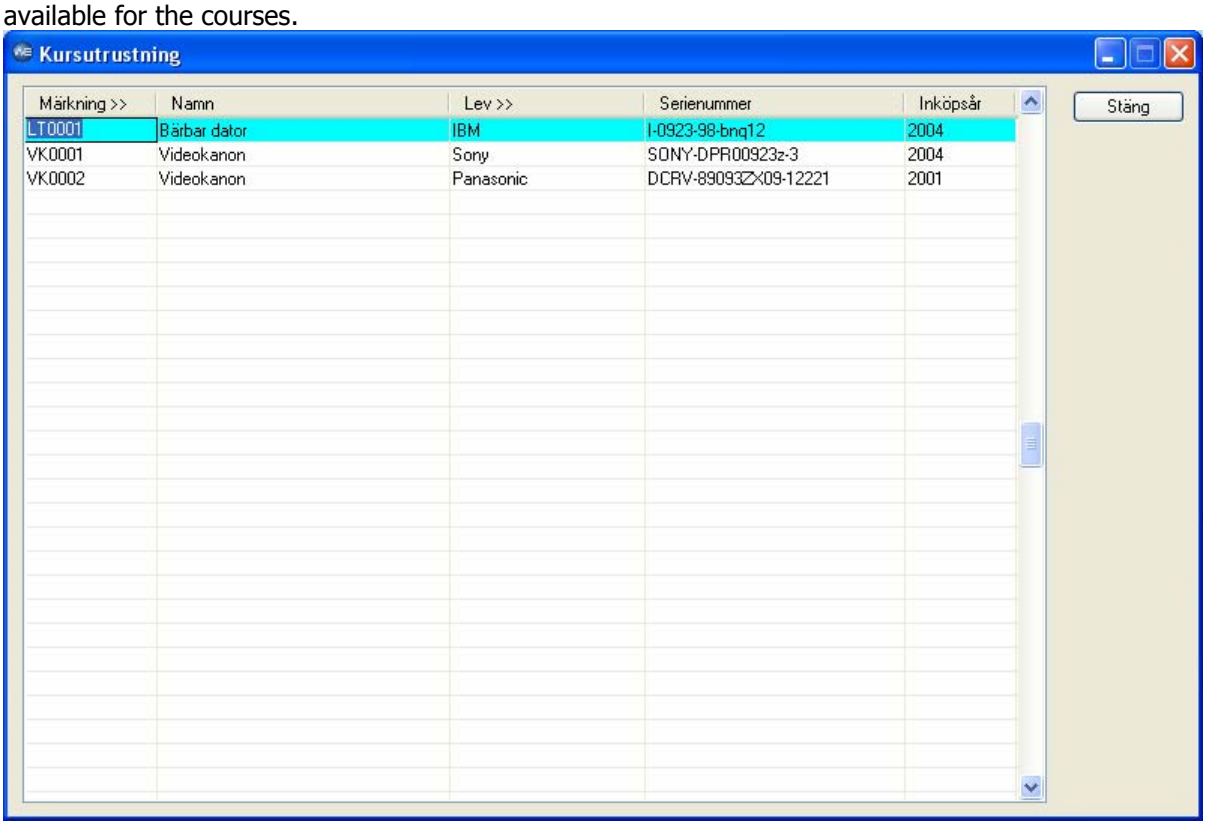


Teachers

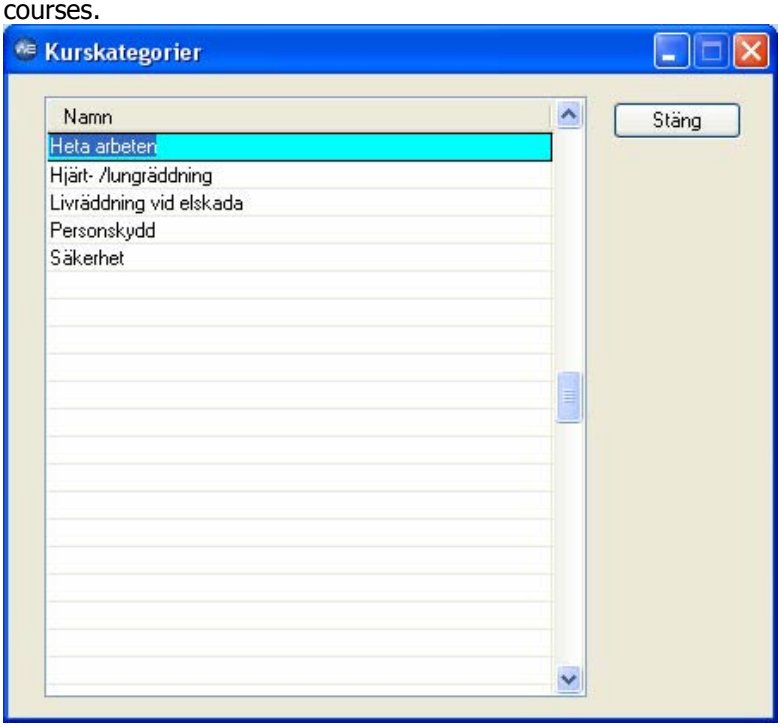
Go to **Program/Course booking system/Teachers**. Here is where you list the teachers available for the courses.



Equipment
Go to **Program/Course booking system/Equipment**. Here is where you list the equipment available for the courses.



Course category
Go to **Program/Course booking system/Course categories**. Here is where you categorise the courses.



Rental system

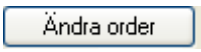
Rental system is an optional module for companies that lease out their equipment or services and therefore want to be able to plan it in a separate calendar. The module consists of Rental order and Rental calendar.
It is also available as Rental order history in the History section.

Rental order

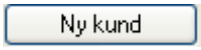
In Rental order you create an order for the leasing out of an object or service.

Click **New order** to create a new rental order.

Click **Create order** to register data**.**
This assigns an order number.



Click **Edit order** to



Click **New customer** to create a quick set-up of a new customer.

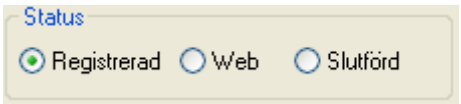
Click **Save** to save the changes you made.

Click **Close** to exit the Rental order view.

Click **Confirm** to print or e-mail the confirmation of the rental order to a customer.

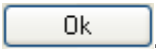
Click **Delivery note** to print a delivery note to a customer.

Click **Cash receipt** to print a cash receipt to a customer.



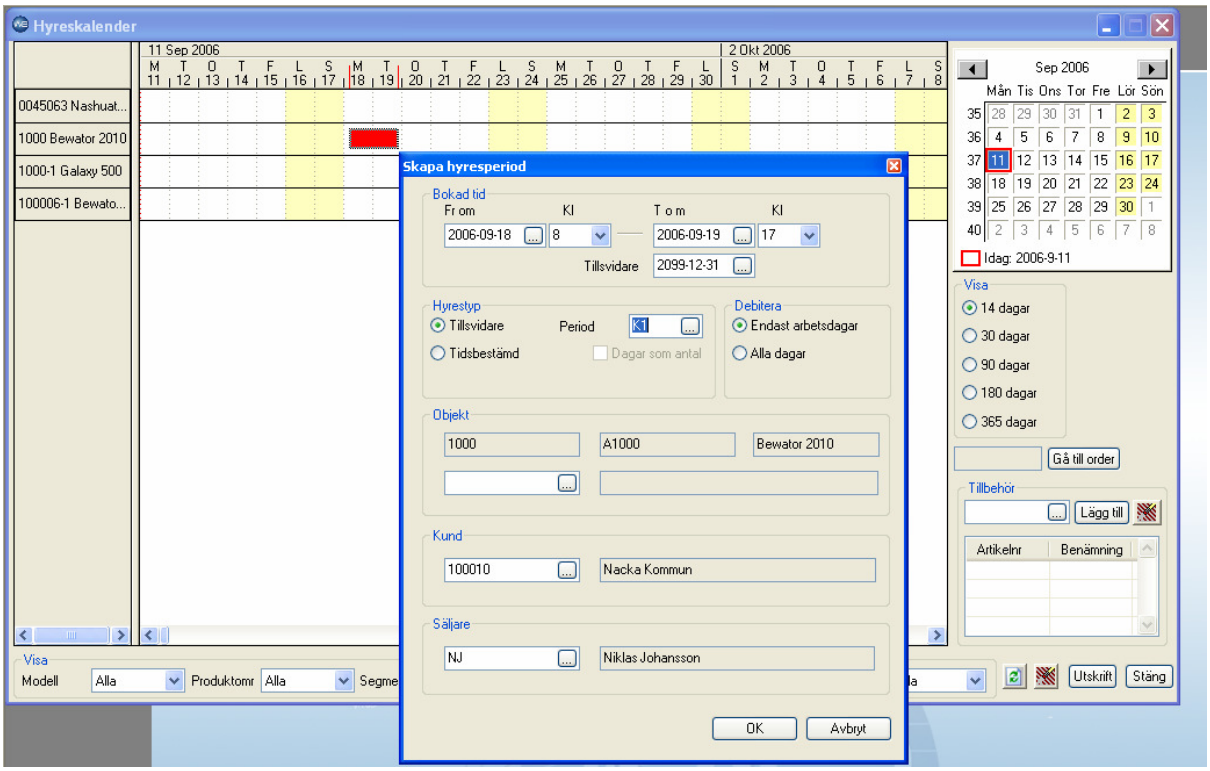
Tick the appropriate status box and click **Save**.
This enables you to distinguish between the orders and know their status.

Register Rental order

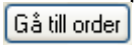
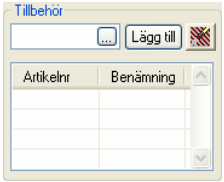
1. Click **Program** in the menu bar and go to **Order/Rental order**.
2. Click **New order** or press Enter.
3. Enter **Orderer** or click the prompt to retrieve the correct contact from the list, and click **OK**  .
4. Enter customer no. and retrieve the information from the database by pressing F9, or click the prompt , search for the object, select it and click **OK**.
5. Click **Create order** or press Enter to register data. This assigns an order number.
6. Most fields are filled in with information from the customer card and from what you entered under Orderer.
   (See 3 above). Those fields can be edited. Fill in the fields **Order mark**, **Your contact** or **Text** if you want to display them on the invoice.
7. Fins the article you want to lease out, either by selecting the Article no. field and pressing F4, or by clicking Article no. or Description in the article field and open the list. Find the correct article and click **Ok**.

8. Ensure that the correct article, quantity and price are displayed in the article row. Include all the articles the customer wants in the article row, and check the order.
9. Select the **Status** in which to save your order, e.g. **Web** if the order is placed through Customer on-line, or **Completed** when the order is completed.
10. Click **Save** to save the rental order.

Rental calendar (Note! Optional module for companies leasing out equipment or services)
The rental calendar makes it easy to see when an object is available for lease. It is easy to create a rental order from this calendar using drag-and-drop.



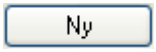
Create Rental order via the calendar

1. Use drag-and-drop to select the time, date and object for the rental order.
2. Select the date(s) and time(s) for the rental order.
3. Fill in the **Orderer** field, or retrieve it from the list.
4. Enter phone number in the **Telephone** field.
5. Enter the **Order mark** field to mark the invoice.
6. Click **OK** to create the service order.
7. You can use the drop-down lists in the **View** field to select your rental order.
8. Clicking the icon clears your selection in the **View** field.
9. Clicking the icon updates the view in order to see the changes made by other users.
10. Clicking the  button opens the Rental order.
11. Clicking the  button allows you to add accessories that are included in the product lease.
12. Print the calendar view with the **Print** button.

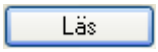
Other

WinServ enables you to create User messages that are displayed when you log in to WinServ, or you can use the time clock to register your starting and finishing times for the workday.

User message



Click **New** to create a new user message.



Click **Read** to read a user message.

Click **Delete** to delete a user message.

Click **Close** to exit the User message view.

New User message

14. Click **Program** in the menu bar and select **Other/User message**.
15. Click **New.**
16. Click in the **User** field and select a user in the list.
17. Click the **Header** field to assign a header to the message.
18. Click in the **Message** field and type the message.
19. Click the **High priority** checkbox to flag any of the messages as important.

Read User message

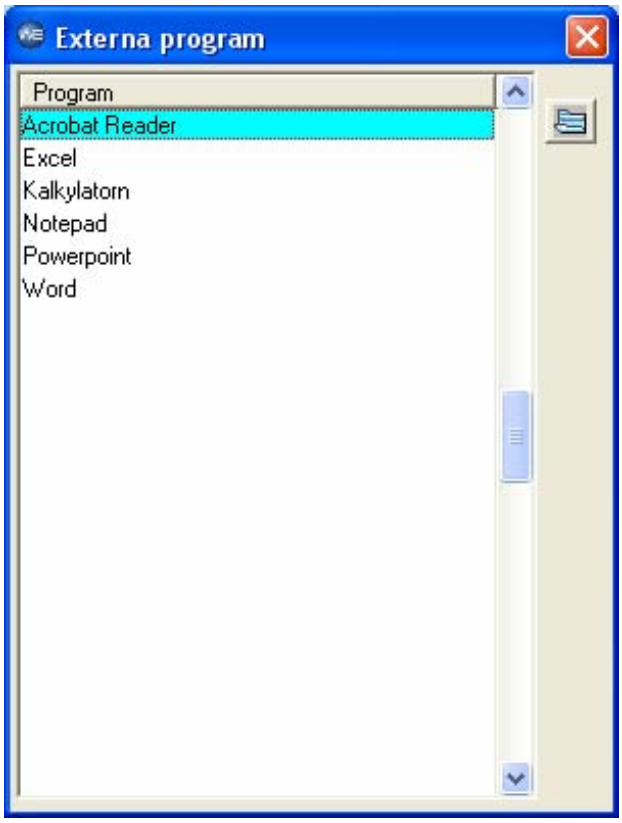
1. Click **Program** in the menu bar and select **Other/User message**.
2. Select the message to read
3. Click **Read.**
4. Click **Close** to exit the window.

Delete User message

7. Click **Program** in the menu bar and select **Other/User message**.
8. Select the user message to delete.
9. Click **Delete**.
10. You are asked to confirm, click **Yes**.
11. The user message is deleted and the view cleared.
12. Click **Close** to exit the window.

External programs

WinServ has a directory of external programs. It contains short-cuts to the programs you want to use in connection with WinServ. Below are some of the programs you might need. Select the ones you do.



- To select a short-cut to a program, click **Program** in the menu bar and then click **External programs**.
- Select the program you want to start and click . The program opens.
- To add paths to new programs, you must have access rights to System/External programs. This is described in the **System** section.

Chapter 3.

Reports

Contents: Reports

- Lists/Master data
- Lists/Parameters
- Statistics
- History
- Stock
- Results analysis
- Time transactions
- Survey
- Report card
- Service order
- Invoice basis
- Invoicing
- Price changes
- Sale support

Reports

The menu bar contains a tab called **Reports**. It contains statistics and bases of everything you register in WinServ. These reports are structured with filters that you apply depending on what you want the report to contain. There are also some additional features and sort orders that can be use to finalise the report.

Lists

In Lists, you print all the various orders on hand.

Lists/Master data

Lists/Master data contains all the information from Customer, Contact, Supplier, Technician, Article, Object, Service contracts or Model. You can also make a register export of this information or export it to Excel to check that the data are correct.

Lists/Parameters

In Lists/System register, you can print lists of all codes and basic parameters you have entered into the WinServ system.

Statistics

Statistics contain appropriate reports on everything pertaining to orders.

History

History contains everything that has been registered for completed orders, contractual invoicing and invoice history, etc.

Stock

Stock contains reports on everything pertaining to stock management, such as Purchase order proposals, Stock listings, Consumed parts and top-ten lists.

Result

Result allows you to check revenues, costs, results analyses and result distributions for all objects.

Time transactions

In Time transactions you can create period reports on what other users have done during working hours. This requires that you have registered the time, either in Orders or in Time registration.

Survey

In Survey you can print the transactions you have made under Survey in Sale support.
See the Program/Sale support section.

Report card

In Report card you print or send report cards to selected customers in order to get their counter readings for their objects in order to be able to debit the correct quantity.

Service order
In Service order you print lists of active service orders, or a service order list of various queues. You can also select additional information from History.

Invoice basis
In Invoice basis you print bases for invoiced orders and contractual invoicing.

Invoicing
If you are using WinServ for invoicing you use these reports for printing invoices of orders as well as contractual invoicing.

Price changes
In Price changes you change fees and prices for you contracted objects. This can be done in percent, in SEK or in accordance with CPI. It can also be done for your articles. It is also possible to make conversions and view Price history.

Sale support
Sale support contains reports on everything pertaining to you sale support, such as information on competitors, sales reports, sales forecasts, ToDo lists and much more.

Chapter 4.

History

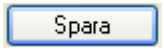
Contents:
Contract history
Consumption order history
Rental order history (optional)
Service order history
Order history

History

The History menu contains Contract history, Consumption order history, Rental order history (optional), Service order history and Order history. It enables you to read everything done to an order, as well as move, delete or change its history. You can also export data to a text file or to Excel.

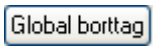
Contract history

On the Contract history tab you can change, move or delete the history. You can also export data in various ways.

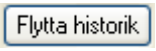


Click **Save** to save the selection.

Click **Update** to save the selection without closing the view.



Click **Global delete** to delete copy or contract history for one or more objects.

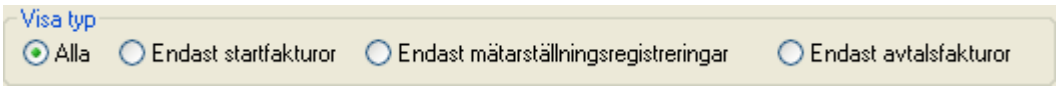


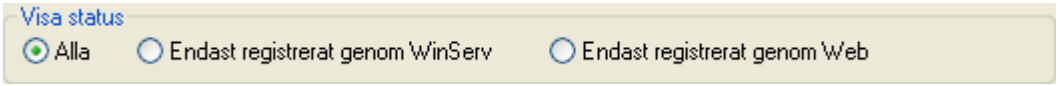
Click **Move history** to move copy or contract history to another object.

Click **Export** to create a text file with your selection. The text file is placed in the folder determined under **System/System parameters/Folders**.

Click the **Excel** button to view your selection in Excel.

Click **Close** to exit the Contract history view.





Find the right Reg. no.

1. Click **History** in the menu bar and select **Contract history**.
2. Click in the **Reg. no.** field and enter the registration number and press **TAB** or **F9**. You can also click the prompt [...] and select the registration number in the list.
3. Select the type of invoice you are looking for in **View type**.
4. Select the status for the order in **View status**.
5. Tick the **View** checkbox to get a selection of printed or not printed orders.
6. You can also search the fields to find the right order.
7. Click **Cancel** to exit the view and go back to the contract history card.

Edit contract history

1. Click **History** in the menu bar and select **Contract history**.
2. Click in the **Reg. no.** field and enter the registration number and press **TAB** or **F9**. You can also click the prompt and select the registration number in the list.
3. Correct the errors in the contract history.
4. Click **Save** to save the changes.

Move Contract history

1. Click **History** in the menu bar and select **Contract history**.
2. Click the **Move history** button.
3. Enter or select the object whence to move the history.
4. Enter or select the object to which you want to move the history.
5. If you do not want to move all the contract history, enter a registration number interval.
6. Click **OK** to move the contract history.

Global delete of Contract history

1. Click **History** in the menu bar and select **Contract history**.
2. Click the **Global delete** button.
3. This allows you to delete contract history for a selected object, customer or period.
   NOTE! You cannot retrieve the history after it has been deleted.
4. Use the filters to set the parameters for the deletion.
5. Click **OK** to delete the contract history for the selected object.

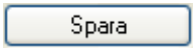
Export Contract history to text file

1. Click **History** in the menu bar and select **Contract history**.
2. Click the **Export** button.
3. This allows you to export contract history to the text file KAHIST.TXT. The text file is located in the folder chosen for export in **System/System parameters/Folders**.
4. Use the filters to set the parameters for the export of history.
5. Select a sort order in the **Choose sort order** field.
6. Click **OK** to export the contract history.

Export Contract history to Excel

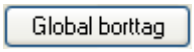
1. Click **History** in the menu bar and select **Contract history**.
2. Click the **Excel** button.
3. This allows you to transfer the contract history to MS Excel.
4. Use the filters to set the parameters for the transfer of contract history.
5. Select a sort order in the **Choose sort order** field.
6. Click **OK** to transfer the contract history.

Consumption order history
On the consumption order history tab you can change, move or delete the history. You can also export data in various ways.

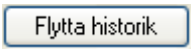


Click **Save** to save the selection.

Click **Update** to save the selection without closing the view.

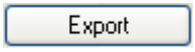


Click **Global delete** to delete consumption order history for one or more objects.



Click **Move history** to move consumption order history to another object.

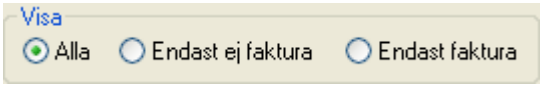
Click **Reverse order** to reverse the order to Registered.

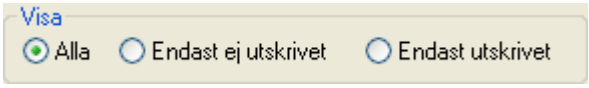


Click **Export** to create a text file of your selection. The text file is placed in the folder determined under **System/System parameters/Catalogues**.

Click the **Excel** button to export your selection to Excel.

Click **Close** to exit the Consumption order history view.





Find the right order number

1. Click **History** in the menu bar and select **Consumption order history**.
2. Click in the **Order no.** field, enter the order number and press **TAB** or **F9**. You can also click the prompt … and select the order number in the list.
3. Tick No invoice only, or Invoice only, in the **View** box.
4. Tick Not printed only, or Printed only, in the other **View** box.
5. You can also search the fields to find the right order.
6. Click **Cancel** to exit the view and go back to the Consumption order history card.

Edit Consumption order history

1. Click **History** in the menu bar and select **Consumption order history**.
2. Click in the **Order no.** field, enter the order number and press **TAB** or **F9**. You can also click the prompt … and select the order number in the list.
3. Correct the errors in the consumption order history.
4. Click **Save** to save the changes.

Move Consumption order history

1. Click **History** in the menu bar and select **Consumption order history**.
2. Click the **Move history** button.
3. Enter or select the object whence to move the history.
4. Enter or select the object to which you want to move the history.
5. If you do not want to move all the consumption order history, enter an order number interval.
6. Click **OK** to move the consumption order history.

Global delete of Consumption order history

1. Click **History** in the menu bar and select **Consumption order history**.
2. Click the **Global delete** button.
3. This allows you to delete consumption order history for a selected object, customer or period.

   NOTE! You cannot retrieve the history after it has been deleted.

4. Use the filters to set the parameters for the deletion.
5. Click **OK** to delete the consumption order history for the selected object.

Export Consumption order history to text file

1. Click **History** in the menu bar and select **Consumption order history**.
2. Click the **Export** button.
3. This allows you to export consumption order history to the text file ORDHIS.TXT. The text file is located in the folder chosen for export in **System/System parameters/Folders**.
4. Use the filters to set the parameters for the export of history.
5. Select a sort order in the **Choose sort order** field.
6. Click **OK** to export the consumption order history.

Export Consumption order history to Excel

1. Click **History** in the menu bar and select **Consumption order history**.
2. Click the **Excel** button.
3. This allows you to transfer the consumption order history to MS Excel.
4. Use the filters to set the parameters for the transfer of consumption order history.
5. Select a sort order in the **Choose sort order** field.
6. Click **OK** to transfer the consumption order history.

Reverse Order

1. Click **History** in the menu bar and select **Consumption order history**.
2. Select the order to reverse.
3. Click the **Reverse order** button.
4. You will be asked ”Do you want to reverse the order xxx, with order queue with Registered status”.
5. Click **Yes** to reverse order.

Rental order history (Note! Optional module for companies leasing out equipment or services)
On the Rental order history tab, you can change, move or delete the history. You can also export data in various ways.

Click **Save** to save the selection.

Click **Reverse order** to reverse the order to Registered.

Click the **Excel** button to export your selection to Excel.

Click **Close** to exit the Rental order history view.

Click the **Excel** button to export your article row level selection to Excel.

Find the right order number

1. Click **History** in the menu bar and select **Rental order history**.
2. Click in the **Order no.** field, enter the order number and press **TAB** or **F9**. You can also click the prompt … and select the order number in the list.
3. Tick No invoice only, or Invoice only, in the **View** box.
4. Tick Not printed only, or Printed only, in the other **View** box.
5. You can select, for example, Customer no. in the filters.
6. You can also search the fields to find the right order.
7. Click **Cancel** to exit the view and go back to the Rental order history card.

Edit Rental order history

1. Click **History** in the menu bar and select **Rental order history**.
2. Click in the **Order no.** field, enter the order number and press **TAB** or **F9**. You can also click the prompt … and select the order number in the list.
3. Correct the errors in the Rental order history.
4. Click **Save** to save the changes.

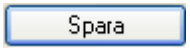
Export Rental order history to Excel

1. Click **History** in the menu bar and select **Rental order history**.
2. Click the **Excel** button.
3. This allows you to transfer the **Rental order history** to **MS Excel**.
4. Use the filters to set the parameters for the transfer of **Rental order history**.
5. Select a sort order in the **Choose sort order** field.
6. Click **OK** to transfer the **Rental order history**.

Reverse Order

1. Click **History** in the menu bar and select **Rental order history**.
2. Select the order to reverse.
3. Click the **Reverse order** button.
4. You will be asked ”Do you want to reverse the order xxx, with order queue with Registered status”.
5. Click **Yes** to reverse order.

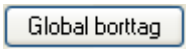
Service order history
On the Service order history tab you can change, move or delete the history. You can also export data in various ways.



Click **Save** to save the selection.

Click **Move history** to move Service order history to another object.

Click **Update** to save the selection without closing the view.



Click **Global delete** to delete Service order history for one or more objects.

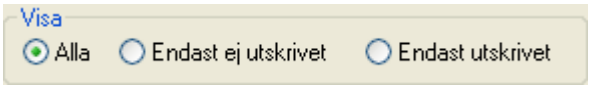
Click **Reverse order** to reverse the order to Registered.

Click **Export** to create a text file of your selection. The text file is placed in the folder determined under **System/System parameters/Folders**.

Click the **Excel** button to view your selection in Excel.

Click the **Protocol** button to print the protocol history for a service order.

Click **Close** to exit the Service order history view.



Find the right order number

8. Click **History** in the menu bar and select **Service order history**.
9. Click in the **Order no.** field, enter the order number and press **TAB** or **F9**. You can also click the prompt ... and select the order number in the list.
10. Tick No invoice only, or Invoice only, in the **View** box.
11. Tick Not printed only, or Printed only, in the other **View** box.
12. You can select, for example, Customer no. in the filters.
13. You can also search the fields to find the right order.
14. Click **Cancel** to exit the view and go back to the Service order history card.

Edit Service order history

5. Click **History** in the menu bar and select **Service order history**.
6. Click in the **Order no.** field, enter the order number and press **TAB** or **F9**. You can also click the prompt ... and select the order number in the list.
7. Correct the errors in the Rental order history.
8. Click **Save** to save the changes.

Move Service order history

1. Click **History** in the menu bar and select **Service order history**.
2. Click the **Move history** button.
3. Enter or select the object whence to move the history.
4. Enter or select the object to which you want to move the history.
9. If you do not want to move all the service order history, enter an order number interval.
10. Click **OK** to move the service order history.

Global delete of Service order history

1. Click **History** in the menu bar and select **Service order history**.
2. Click the **Global delete** button.
3. This allows you to delete Service order history for a selected object, customer or period.

   NOTE! You cannot retrieve the history after it has been deleted.

4. Use the filters to set the parameters for the deletion.
5. Click **OK** to delete the Service order history for the selected object.

Export Service order history to text file

1. Click **History** in the menu bar and select **Service order history**.
2. Click the **Export** button.
3. This allows you to export service order history to the text file JOBHIST.TXT. The text file is located in the folder chosen for export in **System/System parameters/Folders**.
4. Use the filters to set the parameters for the export of history.
5. Select a sort order in the **Choose sort order** field.
6. Click **OK** to export the service order history.

Export Service order history to Excel

7. Click **History** in the menu bar and select **Service order history**.
8. Click the **Excel** button.
9. This allows you to transfer the service history to MS Excel.
10. Use the filters to set the parameters for the transfer of service order history.
11. Select a sort order in the **Choose sort order** field.
12. Click **OK** to transfer the service order history.

Reverse Order

6. Click **History** in the menu bar and select **Service order history**.
7. Select the order to reverse.
8. Click the **Reverse order** button.
9. You will be asked ”Do you want to reverse the order xxx, with order queue with Registered status”.
10. Click **Yes** to reverse order.

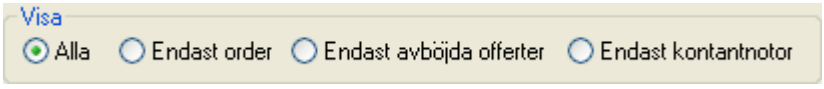
Order history
On the Order history tab you can change, move or delete the history.

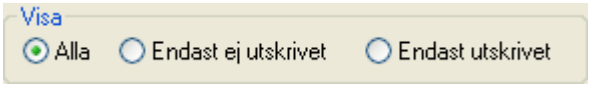
Click **Save** to save the selection.

Click **Reverse order** to reverse the order to Registered.

Click the **Excel** button to view your selection in Excel.

Click **Close** to exit the Order history view.





Find the right order number

1. Click **History** in the menu bar and select O**rder history**.
2. Click in the **Order no.** field, enter the order number and press **TAB** or **F9**. You can also click the prompt … and select the order number in the list.
3. TO select from the list, you use the **View** boxes as per below.
4. Tick No invoice only, or Invoice only, in the first **View** box.
5. Tick Not printed only, or Printed only, in the second **View** box.
6. Tick No invoice no. only, or Invoice no. only, in the third **View** box.
7. Tick Order only, Rejected offers only, or Cash receipt only, in the fourth **View** box.
8. You can also search the fields to find the right order.
9. Click **Cancel** to exit the view and go back to the Order history card.

Edit Order history

1. Click **History** in the menu bar and select **Order history**.
2. Click in the **Order no.** field, enter the order number and press **TAB** or **F9**. You can also click the prompt … and select the order number in the list.
3. Correct the errors in the Order history.
4. Click **Save** to save the changes.

Reverse Order

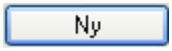
1. Click **History** in the menu bar and select **Order history**.
2. Select the order to reverse.
3. Click the **Reverse order** button.
4. You will be asked ”Do you want to reverse the order xxx, with order queue with Registered status”.
5. Click **Yes** to reverse the order.

Chapter 5.

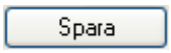
Master data

Contents: Articles
Customers
Contacts
Suppliers
Object
Model
Technician

Articles
In WinServ, you can create anything from simple individual articles to advances structural articles.



Clears the Articles view and opens all fields for new registration of an article.

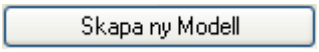


Saves and exits.

Saves registered data without exiting the view.

Closes the Articles window.

Creates a new article on the basis of an existing one.



Creates a new model using Article as a template. Creates a new model in the models listing.

New article

1. Click **Master data** in the menu bar and select **Articles**.
2. Click **New**
3. Click in the **Article no.** field and enter an article number, e.g. A001.
4. Click **Designation 1** and enter the name for the article, e.g. Labour cost normal.
5. Click **Designation 2** and enter the text. Can be used to continue the text that cannot fit under Designation 1.
6. Click in the **Article group** field and enter/retrieve the requested group.
7. View the **Information** tab.
8. Click in the field **Cost price** and enter the internal cost/cost price.
9. Click in the **Sales price1** and enter the price for price list 1, Sales price 2 for price list 2, etc.
10. Click **Save** to save and exit.

Delete article

1. Click **Master data** in the menu bar and select **Articles**.
2. Click in the **Article no.** field and enter/retrieve the article to be deleted, e.g. A001.
3. Click .
4. You are asked to confirm, click **Yes**.
5. The article is deleted and the view cleared.
6. Click **Close** to exit the window.

Information tab

Group Prices: Here is where you register cost price and various sales price lists. You select price list on the Customer or Object level. You can also enter weighed cost price and overseas cost price.

Group Allocations: Here is where you register the various accounts to which the article belongs in the business system.

- Sales account:

- Purchase account:
- Stock account:
- Cost centre:
- Cost unit:
- Project:
- Object:
- VAT code: Select a VAT code for the article in the drop-down list.

Group Supplier: Here is where you register information specific to each supplier.

- Suppliers' article number: Enter/Retrieve the supplier's article number if it is different from your own.
- Supplier number: Enter/Retrieve the supplier's number.
- Discount class: Here, you note the supplier's discount class of the article.

Group Other: Here is where you register behavioural information for the article.

- Article type: Select the article type in the drop-down list.
- Article type (own): Here is where you register your own article type.
- Stock article: Tick the checkbox if the article is in stock.
- Main article in structure: Tick the checkbox if this is a main article in a structure (See the Structure tab).
- No results impact: Tick this checkbox if you do not want this article to generate revenue or expense in the results analysis.
- Sub-article in structure: Tick this checkbox if this is a sub-article in a structure.
- Never part of contract: Tick this checkbox if you want this article to generate an invoice irrespective of whether the customer has a service contract.
- Manufactured article: Tick this checkbox if this is an article of your own manufacture.
- Delivery fee: Tick this checkbox if you want this article to generate a delivery fee if the sum total is below a certain level. In that case, you must also tick the corresponding checkbox for the customer and also assign an article number and a minimum amount for delivery fees in System parameters/Basic settings/General.
- Do not update unit when importing: This is used if you do not want to transfer the business system's units listing when importing articles.
- Stock location: State the stock location if one exists for the article.
- Shelf: State the shelf if one exists for the article.
- Stock quantity: This is the aggregate technician stock quantity for the article. It can be updated from System parameters/Update in order to synchronize it, "Update stock from technician stock".
- Unit: State what type of unit to use for the article, e.g. pcs for pieces.
- Purchased packaging: State how the article is packaged, e.g. six-pack.
- Sales packaging: State how the article is packaged.
- Environment/Return fee: Enter the sum here if you want the article to generate an invoice row with an environmental fee.
- Latest invoice: Displays when the article was last invoiced in an order.

Bitmap tab

Path: State the path to the folder in which you saved the bitmap image of the article.

Notes tab

Internal notes: Here is where you save notes pertaining to the article.

Stock tab
Lists the articles in the different technician stocks.

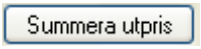
Stock transactions tab
Lists the stock transactions generated by the article.

Web tab

- Group View article in: This controls in which WinServ Online client the article is displayed.
- Group Image: Here is where you enter the path to the folder in which the bitmap is saved, in order to display an image of the article in your online store.
- Group Information: Here is where you include information about the article for the customer.

Structure tab
Here is where you register the sub-articles for the article selected as main article, i.e. when you have ticked the Main article checkbox in Structure on the Information tab. You can also total the prices for the main article by ticking the checkbox, Total to main article on the sub-article.

Click **Total cost price** to see the sum total of the sub-articles' cost price.



Click **Total sales price** to see the sum total of the sub-articles' sales price.

Alarm tab
On the Alarm tab you register article information specific to alarms.

Group Settings:

- Article type: Select the article type, e.g. Card reader or Camera.
- Equipment no.: Register a number for the equipment.
- No. of sections: If the article can have several sections, you register them here.
- Approved: Tick the appropriate checkbox if the article is approved or not.
- Character: If the article can have several characters, you retrieve/enter them here.
- Character type: Enter the character type here.
- Main alarm type: Select the main type of alarm in the drop-down list.
- Exclude from equipment list: Tick the checkbox if article is a service or other type of article that should be excluded from the equipment list.
- Work time: State the work time for the article.

Group Power consumption: State the power consumption of the article.

- Capacity (mA).
- Current, standby (mA).
- Current, alarm (mA).

Service order tab
Displays if the article is included in an invoice row on any of the current service orders.

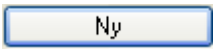
Consumption order tab
Displays if the article is included in an invoice row on any of the current consumption orders.

Order tab
Displays if the article is included in an invoice row on any of the current orders.

Purchase order tab
Displays if the article is included in an invoice row on any of the current purchase orders.

Overseas designation tab
Here is where you register the name of the article in different languages, enabling you to view them in the language selected for the customer.

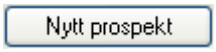
Customers
WinServ allows for the possibility of working with two different types of customers, customers to be invoiced, and prospective customers for whom we store sales support information. Here is where you store all information pertaining to the customer.



Creates a **New customer** and saves it in the WinServ Customers listing. Every time a new customer is created, a unique customer number is generated on the basis of a pre-defined series. You can assign your own number if you wish. A customer number may consist of 14 characters, both letters and numbers.

Click **Save** to save and close.

Click **Update** to save data without closing the view.



Creates a **New prospect** and stores it in the WinServ customers listing. Every time a new prospective customer is created, a unique prospect number is generated on the basis of a pre-defined series. Every prospect number starts with a P.
With a prospective customer, you can work on sales activities, e.g. ToDo, create offers, etc. You cannot create Objects or Service orders. That requires changing it from prospect to an actual customer. See New customer and Prospect > Customer or Change number.

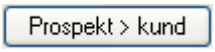
Click **Close** to exit the Customer view.

Click **Update object** to change address information, etc to match what was entered on the customer card.
NOTE! All objects are updated and given the same address. Therefore, we only recommend using this feature if a customer has several objects with different location addresses.

Same feature as Update object. See above.

Prints the customer card.

Changes the existing customer number to a new one. This is also used for changing prospect number to customer number in those instances where you list all your customers in WinServ.



Transfers the sales support information to a ”real” customer number. This feature is used by anyone who lists all the customers in a business system and then imports them to WinServ.

New customer

1. Click **Master data** in the menu bar and select **Customers**.
2. Click **New.**
3. Click in the **Legal name** field and enter the desired name.
4. Press **TAB** after every registration and enter the desired customer information in each field.
5. When you are finished, click **Update** to save the information.
6. Click the **Organisation** tab and enter the desired information.
7. Click the **Parameters** tab and add/check the information; VAT code, Category, District, Sales rep, Delivery method, Payment terms, Technician, etc.
8. Click **Save** to save and exit.

New prospective customer

1. Click **Master data** in the menu bar and select **Customers**.
2. Click **New prospect.**
3. Click in the **Legal name** field and enter the desired name.
4. Press **TAB** after each registration and enter the desired customer information.
5. Click **Save** to save and exit.

Change the customer number of an existing customer

1. Click **Master data** in the menu bar and select **Customers**.
2. Click **Change number.**
3. Click in the **Enter previous no.:** field and enter the number you want to change.
4. Press **TAB** to go to the **Enter new no.:** field and enter the desired customer number.
5. Click **Ok.**
6. You are asked to **confirm**, click **Yes**.
7. You are asked to **confirm** again, click **Yes**. A new customer number is generated and all the information, including customer history, is transferred.

Prospect > Customer

Use this feature to transfer sales support information from a prospect in WinServ to a real customer number. Before transferring the information, you must create the customer in the business system and assign a real customer number, then follow the description below:

1. Click **Prospect > Customer.**
2. Click in the **From customer no.** field and enter the number whence you want to transfer the sales support information, e.g. P140.
3. Press **TAB** to go to the **To customer no.:** field and enter the desired customer number, e.g. 10001.
4. Tick the checkbox in **Delete old customer no.** to delete the old number.
5. Click **Ok.**
6. You are asked to **confirm**, click **Yes**. The sales support information is transferred to the stated customer number.

Information tab

This provides an overview of the activities for this customer. You select the status by ticking the status circles.

Group Contacts: Lists all the contacts with the customer.

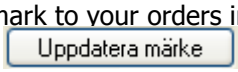
Group Object: Lists all the objects registered with the customer.

Group ToDo: Lists all the ToDos, both current and completed, for this customer. Select Not completed, Completed, or All.

Group Forecast: Lists all the forecasts for the customer. Select Not completed, Completed, or All.

Organisation tab

- **Economic contact:** Enter your economic contact at the customer's. Click the button

to update it for all the customer's objects.
- **Order mark:** Decide whether to attach an order mark to your orders in order for the customer to allocate them to an account. Click the 

button to update it for all the customer's objects.
- **E-mail:** Enter the customer's official address, e.g. info@. Click the icons to send an e-mail, either through the SMTP address, or through your e-mail client, .
- **Web:** Enter the official web site of the customer. Click the icon to open the web site.
- **EAN code:** Enter the EAN code of the workplace.
- **Bank giro:** Enter the customer's bank giro number.
- **Plus giro:** Enter the customer's bank giro number.
- **Country code:** Enter the customer's country code, if it is an overseas company.
- **Currency:** Enter the customer's currency, if it is an overseas company.
- **Type of company:** Enter the type of company, e.g. limited.
- **SNI code main business:** The Central Statistics Office has codes for trade. They can be entered here.
- **SNI code secondary business:** The Central Statistics Office has codes for trade. They can be entered here.
- **Credit rating:** Enter the customer's credit rating.
- **Annual accounts month:** Enter the month in which the customer balances the annual accounts.
- **PARID:** Enter the customer's ID with the Postal Services Address Register, PAR.
- **CFAR no.:** Enter the customer's CFAR number.
- **County code:** Enter the customer's county code.
- **A Region:** Enter the customer's region.
- **Employees:** Enter the customer's total number of employees.
- **Turnover:** Enter the turnover of the customer.
- **Equity:** Enter the equity of the customer.
- **Founding year:** Enter the founding year of the customer.
- **Municipal code:** Enter the customer's municipal code.

NOTE! All this information can be retrieved from the Central Statistics Office.

Group Credit: Lists the customer's credit rating. This information comes from the business system for the systems that include a feature enabling them to export this information.

Group Contact: Provides information on when the customer was last contacted, either through a ToDo item or manually, as well as notes.

Group Limits: Lists the customer's upper and lower credit limits.

Parameters tab

- **VAT code:** Enter the VAT code for the customer.
- **Category:** Enter a category for the customer to facilitate selection of reports.

- **District:** Select a district for the customer to facilitate the division of customers among the sales reps.
- **Sales rep 1:** Enter, for example, the direct sales rep for this customer.
- **Sales rep 2:** Enter, for example, the consumables sales rep for this customer.
- **Method of delivery:** Enter the default value for how offers/orders should be delivered.
- **Delivery terms:** Enter the default value for how the delivery of offers/orders should be paid.
- **Terms of payment:** Enter the default value for the payment terms for the offers/orders.
- **Technician** Enter the technician responsible for this customer.
- **Region:** Enter/retrieve a regional code for the customer.
- **Internal code:** Use an internal code with a path linked to a folder, to ensure that order files and contractual invoicing are assigned to different companies in the business system, in case there are several companies using the same WinServ.
- **Stock:** Enter the default stock for the customer.
- **Miscellaneous object nos.:** Enter a miscellaneous object number for the customer in order to create a number series, giving the next object created for the customer the next consecutive number in the series.
- **Contract type:** Enter/retrieve the default contract type that is selected when you create a new object.
- **Discount contract (customer no.):** Enter the customer number used by this customer for the discount in the price matrix. For example, companies belonging to a group but with their own customer numbers.
- **Basic customer no. (Supplier's customer no.):** Enter your customer no. at your main supplier's.
- **Customer priority:** Select a priority for the customer.

There are Update buttons by Category, District, etc. Use theses when making changes and you want the change to be made to all the object cards of that customer.

Group Allocations: Here, you enter the customer's cost centres, etc.

- **Cost centre:** Enter the customer's cost centre.
- **Cost unit:** Enter a cost unit for the customer.
- **Project:** Enter a project the customer belongs to.
- **Object:** Enter an object for the customer.

Group Times: Enter response and start times for all objects of the customer.

- Response time contract: Enter the number of hours within which a technician must be on location to start repairs on the customer's object from the time the problem is reported.
- Response time no contract: Enter the number of hours within which a technician must be on location to start repairs on the customer's object from the time the problem is reported.
- Start time contract: Enter the number of hours within which a technician must complete repairs on the customer's object from the time the problem is reported.
- Start time no contract: Enter the number of hours within which a technician must complete repairs on the customer's object from the time the problem is reported.

Group Other:

- Joint invoicing: Tick the checkbox if you want WinServ to include a Y(es) about this being a joint invoicing customer in the order file. If you do not tick the box, the order file will be sent with a N(o). Some business systems read this a confirmation to jointly invoice those order files (check with your ERP supplier). (NOTE! this is only sent with contractual invoicing and copy debiting).

- Blocked: Tick this checkbox if you do not want this customer to be able to order without seeing a message saying that the customer is blocked, for example due to unpaid invoices.
- Invoicing fee: Tick the checkbox if you want WinServ to include information in the order file about an invoicing fee for this customer.
  (check with your ERP supplier).
- Environment/Return fee order: Tick the checkbox if you want his customer's orders to add an environmental article with a percentage addition. You must add a percentage for the articles that should have an environmental article, and you must create an article as an environmental fee in System parameters/Basic settings/General.
- Delivery fee order: Tick the checkbox if you want to add a delivery fee to the orders. You must also tick the checkbox for the article to have a delivery fee, as well as state in System parameters/Basic settings/General an article number for the delivery fee and an minimum amount, that i.e. orders below that amount generates a delivery fee.
- Start fee service order: Tick the checkbox if you want to add a start fee to the article row when creating a service order. You must enter/retrieve an article under System parameters/Basic settings/General and "Article no. for start fee".
- Do NOT create invoice basis/order file: Tick the checkbox if you do not want to generate an order file when completing an order for this customer.
- Require Order mark: Tick the checkbox to require an order mark to be entered on new orders for this customer.

Group Customer sales rep: Enter the sales reps responsible for this customer. For example, sales reps with different areas of responsibility.

Group Customer Category: Enter the catagory the customer belongs to in order to display reports in catogory.

Object tab
Displays the objects registered to this customer. It also displays the current service orders and consumption orders as well as their history.

Contacts tab
Displays your contacts at the customer's. You can also create a new contact or change an existing one.

ToDo tab
Displays all of the customer's ToDo items, i.e. all the present and past activities for the customer. You can also create a new ToDo item or change an existing one.

Forecast tab
Displays all the forecasts for the customer, i.e. what you think you will be able to sell to the customer, in order for the sales management to be able to plan ahead. You can also create a new forecast or change an existing one.

Competitor tab
Displays the competitors' objects giving you an edge in selling to the customer. You can also create a new ToDo item or change an existing one.

Price matrix tab
Enter the customer's discounts.

Group Price matrix: Enter a price matrix for the articles you want to give the customer a discount for, you can choose from a price list, net price, percent discount and can use the date fields to limit the discount in time. If you tick the checkbox,
Also article group discount, the article gets that discount as well.

Group Article group discount: Enter a price matrix for the article groups you want to give the customer a discount for, you can choose a percent discount and use the date fields to limit the discount in time.

Group price staggering: Set the price for an article depending on quantity, e.g. SEK 100 for quantities from 1-100, SEK 80 for quantities from 101-1000, and SEK 70 for quantities above 1000.

Delivery address tab
Displays the customer's delivery addresses. You can also create new delivery addresses or change existing ones.

Order tab
Displays the customer's orders. You can also create new orders or change existing ones.

Order history tab
Displays the history of the customer's orders and their order rows.

Notes tab
Here, you can make notes about the customer or register your dialogue with the customer instead of with a contact through a ToDo item.

Group Notes: For general internal notes about the customer.
Group Customer notes: For noting down your dialogue with the customer.
Group Customer message: For writing a note that is displayed when registering any type of order.

Web tab
Here, you administer the customer's right s for WinServ Customer Online.

Group Password: Enter the password the customer needs to log in to WinServ Online Customer.

Group Language: Enter the desired language for the customer's login to Customer Online.

Group Rights: Tick the checkboxes to which the customer should have access.

Group Sub-customers: Enter the sub-customers you want to be able to use the customer's login and rights. It could, for example, be a customer that has different customer numbers.

Group Alternative web login: Enter an alternative login based on either object number, or e-mail address and a password. This makes it easier to manage a customer that has several different objects in different locations or departments.

Document tab
Here, you can link all the documents pertaining to a customer.

- Date: The date is filled in when you create the link to the document.
- Document >>: Here, you can browse to the folder in which you have saved the document.
- Document type: Here, you retrieve the document type to which the document should belong. Document types are created under Parameters/Codes/Document types.
- Description: Enter a description of the document.
- Contact: Enter any contact for the document.
- Web access: Tick the checkbox if you want the document to be accessible via the web. Contact WS Software (special network requirements).
- Sign: Enter your signature so that other people can see who created the link.
- Click to create a folder with the customer number. You can state the folder structure next to Create folder.
- Click to get to the selected folder.

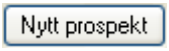
Forms tab

Displays the form templates. By clicking you create a document, e.g. a letter or an offer. The customer information is imported to the document.

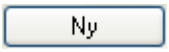
The document is saved under the Document tab. By clicking you open the selected template without importing the customer information to the document. This enables you to register the information yourself.

Contacts
WinServ has a contacts listing. It stores all the ToDo history and all the ToDo items not completed. You can also store information about the contact's forecast on upcoming transactions, the objects of the contact, the competitors and the profile of the contact. You can also view current orders of the contact, order history, discounts, campaigns, customer activities, home address, customer information, documents and forms pertaining to the contact. All this can be stored, giving you an edge in your next transaction with the contact.

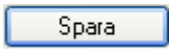
Click **Customer** to open the contact's customer card.



Click **New prospect** to make a quick setup of a customer/prospect in the customers listing.



Click **New** to create a new contact.



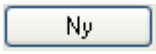
Click **Save** to save and close.

Click **Update** to save data without closing the view.

Click **Contact card** to find a contact and print the information.

Click **Close** to exit the Customer view.

Click **Edit** to edit the information in an existing ToDo item.



Click **New** to create a new ToDo item.

Click this button to create an offer/order using the information from the contact.

New contact

1. Click **Master data** in the menu bar and select **Contacts**.
2. Click **New.**
3. The **Name** field opens, enter the desired name.
4. Press **TAB** after every registration and enter the desired contact information in each field.
5. When you come to customer no., select/search in the list.
6. Click **Update** to save data without closing the Contacts view.
7. Continue updating the other tabs or create a ToDo item.
8. Click **Save** to save and exit.

New prospective customer

1. Click **Master data** in the menu bar and select **Contacts**.
2. Click **New prospect**.
3. Click **Generate prospect no.** to create a serial number for the prospect.
4. Untick the **Prospect** checkbox to create a customer in the customers listing. Prospect is pre-selected.
5. Click in the **Legal name** field and enter the desired name.
6. Press **TAB** after each registration and enter the desired customer information.
7. Click **Save** to save and exit.

ToDo tab

Displays all the active ToDo items as well as the completed ones pertaining to the contact. You can also create a new ToDo item or change an existing one.

Group ToDo customer: Lists all the ToDo items not completed for the customer.

Group History contact: Lists all the ToDo items completed for this contact.

Forecast tab

Here is where you view, create or change the forecast of ongoing transactions with this customer, and your contact.

Object tab
Lists all the objects registered for the customer.

Competitor tab
Here is where you register information about the competition, in order to know what you are up against and be able to prepare.

Profile tab
Here, you register information about the contact in order to create a profile on him. This helps in selecting the right contact to approach, concerning sales of a specific product or for finding the right people for an event.

Order tab
Lists the open orders for the customer and the articles they concern.

Order history tab
Lists the previous orders of the customer and the articles purchased.

Discounts tab
Lists the discounts of the customer in the form of Price matrix and article group discount.

Campaigns tab
Lists the campaigns the customer is entitled to.

Customer activities tab
Lists the activities the customer is entitled to.

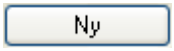
Home address tab
Here, you can enter the person's home address, birthday, etc. You can also include a picture of the contact or his home. You save a picture in a folder on the server and browse your way there.

Customer information tab
Displays a lot of the information included on the customer card. If somebody performs a ToDo item, the Contacted checkbox, date and signature are registered. It allows you to select Contacted or Not contacted in the contacts listing. It also tells you when the contact card was last updated.

Document tab
Enter the paths to the documents pertaining to the contact, on the server.

Form tab
Enables easy access to your forms. The paths to forms are entered under Parameters/Forms.

Suppliers
In WinServ, you can create different suppliers according to their specific tasks.

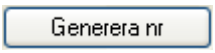


Clears the Suppliers view and opens all fields for new registration of suppliers.

Saves and exits.

Saves registered data without exiting the view.

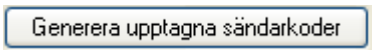
Closes the Suppliers window.



Creates a supplier number based on a pre-defined series. Click Generate no. in connection with creating a new supplier.

Generates transmitter codes.

Deletes transmitter codes.



Generates busy transmitter codes.

New supplier

11. Click **Master data** in the menu bar and select **Suppliers**.
12. Click **New**
13. Click in the **Supplier no.** field an enter a supplier number, or generate one by clicking **Generate no.** to create a supplier number based on a pre-defined series.
14. Click **Name** and enter the desired name for the supplier. Continue with department, addresses, etc.
15. On the **Information** tab, enter contacts, phone numbers, etc. depending on the information you need.
16. View the **Economy** tab. Enter the supplier's bank and post giro numbers, etc.
17. View the **Notes** tab. Enter internal information about the supplier.
18. View the **Bitmaps** tab. Here, you can save a picture of those working for the supplier, or of what the supplier sells.
19. View the **Purchase orders** tab. It lists a history of the purchase orders placed with the supplier.
20. View the **Alarm** tab. (NOTE! Security industry only) Enter information about the supplier's emergency service centre with alarm codes, etc.
21. Click **Save** to save and exit.

Information tab
List the supplier's contacts and contact information.

- Contact
- Phone
- Fax
- E-mail
- Web
- EAN code
- Customer no.
- Method of delivery
- Corporate ID

Economy tab
Enter the payment information for the supplier

- Bank giro
- Plus giro
- Currency
- Terms of payment

Notes tab
Here, you take down notes about the supplier.

Bitmap tab
Here, you enter, for example, the path to a picture of the supplier or the building.

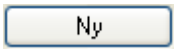
Purchase order tab
Lists all the registered and completed purchase orders for this supplier.

Alarm tab (NOTE! security industry only)
Links the supplier with the emergency service or surveillance centre, or both.
You enter the phone numbers for the ///larmbord, customer services, etc..
You can also create, delete or generate busy transmitter codes.

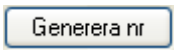
Object

WinServ consists of an extensive object directory. Each object has a unique object number and invoice recipient, and is described by a model. Every invoice recipient can be linked to an infinite number of objects. Every object, i.e. service object, can have unique properties depending on equipment, service interval, contract, etc. The properties for each service object are documented in the WinServ object directory.
Service objects can have many different names. In the WinServ system settings, you can change the name from Object and Object number, to something more befitting the company. Below are some examples of object names in different industries:

Object	Object no.	
Machine	Machine no.	Office supplies, Vending
Establishment	Establishment no.	Security industry
List	Lift no.	Lift industry
Venue	Venue no.	Electricity, Cleaning industry
License	License no.	Computer industry



Click **New** to create a new object.



Click **Generate no**. in connection with creating a new object.
This creates an object number based on a pre-defined series.

Click **Change number** to change the object number. Assuming you used the above feature, **Generate no.**, when creating a new object, you can then use **Change number** to change that to another number later.

Click **Save** to save and close the view.

Click **Print** to print the object card.

Click **Start/end invoice** to phase a new object into the correct debiting period for contracts and fees, or to send the final invoice.

Click **Delete** to remove an object from the directory.

Click **Update** to save registered data without losing the information in the view.

Click **Quick set-up** to quickly create a new object.

Click **Close** to exit the Object view.

Click **Service order** to create a service order through the object card

Click **Consumption order** to create a consumption order through the object card.

Click **Retrieve customer information** to transfer address and parameter settings from the selected customer to the object.
This is a quick way of transferring information to object from the customer.

New object

1. Click **Master data** in the menu bar and select **Object**.
2. Click **New.**
3. Click **Generate no.** to assign a unique object number, or click in the **Object no.** fields and enter the desired number.
4. Click in the **Object type** field and enter/retrieve the desired object type.
5. Click in the **Customer no.** field and enter/retrieve the desired customer number. The selected customer number will be the invoice recipient for the object.
6. Press **TAB**.
7. Click **Retrieve customer information**. The information from the selected customer number is transferred to the object.

Installation tab

1. Group Installation address: The address for the customer is transferred here. If the object is listed under another address than the customer address, you register it here, together with other object-specific information.
2. Group Notes: Here, you make notes about the object and decide whether to display those notes on the service order or not. You can also add a fixed message that is permanently visible on the service under **Message** on the printed service order.
3. Group contacts: Here, you register the various contacts and their phone numbers and e-mail addresses. You can e-mail those contacts by clicking to send the e-mail through your server's SMTP service, or click to send it through MS Outlook Express.
   You can also register an order mark that is visible on the service order.
4. Group Contract document: Here, you enter a path to a folder on the server where you have stored your scanned and signed contractual documents. You retrieve and read the document by clicking or print it by clicking .
5. Group Image: Here, you enter a path to a folder on the server where you have stored your pictures of the object. This displays a picture of the object on the object card.
6. Group document: Here, you can store a text document for MS Notepad concerning the object, the field's name is object number.txt.
7. Group template document: This is a short-cut for printing templates, e.g. Contract template, On-call contract or Information leaflet.

Parameters tab

Parameters are important settings, both for linking the business system and for selecting lists and reports.

1. Group Purchase: Here, you register you purchasing information for the object. You can use a depreciation feature found under Reports/Lists/Master data/Object/Values depreciation.

- **Date of purchase:** Register the date when you purchased the object from your supplier.
- **Supplier:** Enter/retrieve the supplier from whom you purchased the object.
- **Net book value:** Enter the net book value.
- **Accumulated depreciations:** Here, you register the accumulated value of the depreciations when using the feature, Values depreciation. You can also manually enter the value.
- **Cost price:** Enter the purchase price of the object.
- **Invoice no.:** Enter the supplier's invoice number.

- **Latest depreciation:** Here, you register the latest depreciation when using the feature, Values depreciation. You can also manually enter the value.
- **No. of depreciations:** Here, you enter the number of depreciations made when using the **Values depreciation** feature. You can also manually enter the value.

2. Group sales: Here, you register the sales information about the object.
    - **Installation date:** Registers when the object was installed at the customer's.
    - **Warranty to:** Here, you register the object's warranty period.
    - **Financing contract type:** Here, you register the financing method used for the object.
    - **Location code:** Here, you register the location of the object, e.g. at a customer's or in the second-hand stock.
    - **Sales price:** Here, you register at what price the object was sold.
    - **Invoice no.:** Here, you register the customer's invoice number for the sale of the object.
    - **Date of sale:** Enter the date when the object was sold.
    - **Trade-in date:** Enter the date when the object was traded in.

3. Group Financing: Here, you register how the customer financed the object.
    - **Finance company:** Enter the finance company that financed the object.
    - **Approved by:** Enter the name of the person who approved the financing.
    - **Base amount:** Enter the amount for which the object was purchased.
    - **Calculation price:** Enter the price on which financing was based.
    - **Net book value %:** State whether you financed the object with a net book value.
    - **Start CPI:** Enter the CPI for when financing was initiated.
    - **Financing contract no.:** Enter the number of the financing contract.
    - **Start date:** Enter the start date for the financing.
    - **End date:** Enter the end date for the financing.
    - **Rental period:** Enter the number of months that financing is based on.
    - **Additional interest:** Enter the interest rate if an additional interest will be added to the financing.
    - **Current CPI:** Enter the present CPI.

4. Group Customer: Here, you register customer-specific information.
    - **Category:** Here, you categorise your customers in order to facilitate report selection.
    - **District:** Here, you divide your objects by district in order to facilitate the allocation of technicians and sales reps.
    - **Method of delivery:** Enter the default value for how consumption orders should be delivered.
    - **Delivery terms:** Enter the default value for how the delivery of consumption orders should be paid.
    - **Terms of payment:** Enter the default value for the payment terms of the consumption orders.

5. Group Travel: Enter the zone and region in which the object is installed.
    - **Zone no.:** Enter the zone suggested when reporting times and distances on the service order.
    - **Region:** Enter the region in which the object is installed, in order to facilitate report or list selection.

6. Group Persons responsible: Here, you enter the persons and positions responsible for the object.

- **Sales rep:** register the responsible sales rep.
- **Technician:** Enter the responsible technician.
- **Administrator:** Enter the responsible administrator.
- **Project manager:** Enter the responsible project manager.

7. Group Internal information: Here, you register information necessary for the reporting of internal costs and revenue.
   - **Internal code:** Use an internal code with a path linked to a folder, to ensure that order files and contractual invoicing are assigned to different business systems, in case there are several companies using the same WinServ.
   - **Cost centre:** Here, you enter the cost centre to which you want to assign the object in your business system.
   - **Object:** Here, you enter the object to which you want to assign the object in your business system.
   - **Cost unit:** Here, you enter the cost unit to which you want to assign the object in your business system.
   - **Project:** Here, you enter the project to which you want to assign the object in your business system.
   - **Currency:** Here, you enter the object's currency.

8. Group Properties: Here, you enter the measurements, weight and volume of the object, in order to plan for the space occupied by the object in stock.

Contract tab

Every object can be linked to a service contract with a unique service fee. The service contract tab is linked to a service order that, by default, includes consumables and work time, i.e. all articles that are completed on a service order if an object has a service contract. If the service fee does not include consumables and work hours, you must enter a date from which the articles should be debited, preferably the same date as the installation date. Depending on your choices, the service order's Invoiced checkbox is ticked or unticked, and sales price added. You can always change this checkbox. Aside from the link to a service order, there is automatic monitoring of the service contract's extending, see below.
The Contract tab has sub-tabs, such as Service, Counter, Staggering, Group contract and Time bank, which are described below.

Add Service contract

1. Click the **Contract** tab.
2. Click in the **Service contract to** field.
3. Enter a date for the expiration of the service contract and press **TAB**.
4. Click in the **Extend period** and enter the number of days with which the service contract should be extended. Extension of a contract is automatic.
5. Click in the **Service contract type** field.
6. Enter/retrieve the desired service contract type and press **TAB**.
7. Click in the **Articles debited from** field, and enter a date from which the articles completed on a service order should be invoiced. If the service fee does not cover the cost of consumption and work time, etc., enter the same date as the installation date.
8. Click in the **Article no.** field under Service contract.
9. Enter/retrieve the desired **article** for the service fee.
10. Press **TAB** until you come to the **Service fee** field and enter the amount to be debited.

11. Press **TAB** until you come to the **Deb. period** field.
12. Enter/retrieve the desired **Debit period**, e.g. Q1, meaning quarterly invoicing, starting in January.
13. Press **TAB** until you come to the End date field, and enter the date 2099-12-31.
14. Click **Update** to save, or click **Save** to save and exit.

Service tab

1. Group Contract:
   - **Service contract to:** Enter the period of the contract.
   - **On-call contract to:** Enter the period of the contract.
   - **Extend period:** Enter the period for the extension of the contract.
   - **Service contract type:** Enter the type of contract to register. The service contract types are created in Parameters/Object/Service contract types.
   - **Articles debited from:** Enter the date from which articles are no longer included in the service contract.
   - **Contract prices fixed to:** Enter the date at which the contract is affected by price changes.
   - **Contract signed by:** Enter the name of the person who signed the contract for the customer.
   - **Date:** Enter the date for the signing of the Service contract.
   - **Special terms:** Here, you include any special terms that apply to the service contract.

2. Group Service contract: Enter the service fee for the service contract.
   - **Article no.:** Enter/retrieve the article for the service fee.
   - **Designation:** The designation for the article.
   - **Costs price:** Enter the price of the article if the service is purchased from a third party.
   - **Service fee:** Enter the customer's service fee.
   - **Rental part:** This is used if you added the service fee and the rent, and want to specify the size of the rental part.
   - **Debit period:** Enter/retrieve the debit period of the contract.
   - **Start date:** Enter the start date of the service contract. The service contract cannot be debited before this date.
   - **End date:** Enter the end date of the service contract. The service contract cannot be debited after this date.
   - **Text:** Here, you write a text explaining the service contract. Tick the Text on invoice checkbox.
   - **Financed service fee does not create order:** Tick this checkbox if you have included the cost of the service fee in the financing. You register the contract as per usual, because you want to include it in the statistics, but with the checkbox ticked, no order file is generated and, hence, no invoice.
   - **Latest contractual invoice:** For contractual invoicing, the From and To dates are registered in this field.

3. Group On-call contract: Here, you register the on-call fee and the parameters of the on-call contract.
   - **Article no.:** Enter/retrieve the article for the on-call fee.
   - **Designation:** The designation for the article.
   - **Cost price:** Enter the price of the article if the service is purchased from a third party.
   - **On-call fee:** Enter the customer's on-call fee.

- **Rental part:** This is used if you added the on-call fee and the rent, and want to specify the size of the rental part.
- **Debit period:** Enter/retrieve the debit period of the contract.
- **Start date:** Enter the start date of the on-call contract. The on-call contract cannot be debited before this date.
- **End date:** Enter the end date of the on-call contract. The on-call contract cannot be debited after this date.
- **Text:** Here, you write a text explaining the on-call contract. Tick the Text on invoice checkbox.

4. Group Cancelled: Here, you register information pertaining to the cancellation of a contract.
   - **Cancelled on:** Enter/retrieve the date for the cancellation. This date is searchable in the Cancelled contracts report.
   - **Cancelled by:** Enter the name of the person who cancelled the contract.
   - **Comment:** Enter a comment about why the contract was cancelled.
   - **End debit on:** Enter the date of the final debiting for the object.
   - **End debit by:** Enter the name of the person who made final debiting for the object.

5. Group Alternative customer no. for contractual invoicing:
   - **Customer no.:** Enter/retrieve the customer number (if different from the object's customer number) that you want the invoice for the contract to be sent to.

6. Group Index: Here you add an indexation in order to add an index-weighed increase as an order row together with the service fee, when completing a service order. Index lists must be maintained.
   - Index: Enter/retrieve the index code.
   - Start index: Enter the start index.

Counter tab

1. Group Report card: Enter the report card settings.
   - **Report card:** Tick the checkbox if a report card should be sent to the customer. The period is high-lighted and you enter/retrieve the period in which to send a report card to the customer.
   - **Report card via fax:** Tick this checkbox to fax the report card. The fax field is high-lighted and you enter the customer's fax number.
   - **Report card via e-mail:** Tick the checkbox Report card via e-mail, together with Report card, if you want to e-mail report card. The e-mail field is high—lighted and you enter the customer's e-mail address.
   - **Do not show prev. counter reading:** Tick this checkbox if you do not want to show the previous counter reading on the report card.
   - **Delay fee:** Tick this checkbox to manually indicate that the customer is late in submitting the report card and should be charged a delay fee.
   - **Text on report card:** Here, you can include a text specific for this object.
   - **Print from:** Enter the date from which the report card can be printed or sent. No report card can be generated before this date.
   - **Print to:** Enter the date up until which the report card can be printed or sent. No report card can be generated after this date.

- **Dispatch:** The date for the printing of the report card is registered here.
- **Status:** This is a switch that is flicked. When printing a report card, the switch is flicked to Printed. In case of counter registration, it is switched to Invoicing.
- **Text for counter:** Here, you can change the text, i.e. the names of the various counters. It applies to this object only.

2. Group Consumption: Here, you see if consumption is included, as well as how many toners they have received and how many they are due. You must select a debit type with a balance function in order for this feature to work. You must also register the number of copies each toner can produce, in Master data/Model/Consumption. In addition, you must tick the checkbox "Monitor balance" in System/System parameters/Basic settings/Order management.
    - **Part of contract:** Tick this checkbox if toner is included in the service contract.
    - **Price list:** Select the price list from which consumption should be charged.
    - **Balance:** Lists the number of toners the customer has left.
    - **Received:** Lists the number of toners the customer has received.
    - **Sufficient for:** Lists the number of copies the customer's toner will produce.
    - **Left:** Lists the number of toners the customer has left.

3. Group Counter: Here, you register everything that pertains to the object's counter.
    - **Debit type:** Select the function of the contract. It is automatically selected when selecting service contract type (see Service tab/Service contract type).
    - **Accumulation type:** Here, you determine how and when to invoice, by selecting an accumulation type. It is automatically selected when selecting service contract type (see Service tab/Service contract type).
    - **Alternative customer no. for counter registration: Customer no.:** Enter/retrieve the customer number (if different from the object's customer number) that you want the invoice for the counter to be sent to.
    - **Article no.:** Enter/retrieve the article for the debiting of copies. You can have up to four counter articles.
    - **Qty per day:** An average calculation based on the technicians' reports. This feature will appear in future versions of WinServ.
    - **Qty guaranteed:** A field with no links in which you can enter, for example, a guaranteed quantity the customer has pledged to.
    - **Qty included:** Enter the number of copies included in he contract for the debit period.
    - **Cost price apiece:** Enter the price of the article if the service is purchased from a third party.
    - **Price apiece:** Enter your sales price per copy to customer.
    - **Rental part:** This is used if you added the price apiece and the rent, and want to specify the size of the rental part.
    - **Up debited qty:** Enter the number of up debited copies. This requires that you are using Debit type A. Up debit contract.
    - **Accumulated qty:** Lists the accumulated copies when using accumulation type 1-6.
    - **Installation counter reading:** Enter the counter reading at the time the object is installed.
    - **Latest counter reading:** Enter the latest counter reading when making a counter registration.
    - **Latest read date:** Enter the latest read date when making a counter registration.
    - **Latest invoice date:** Lists the latest invoicing of the copies.

Staggering tab

1. Group Counter 1: Here, you stagger your prices per copy for Counter 1, making it less expensive for the customer, the more copies he makes.
    - **Stagger:** Tick the checkbox to use this feature.
    - **From:** Enter the quantity from which the price per copy applies.
    - **To:** Enter the quantity up to which the price per copy applies.
    - **Price:** Enter the price per copy for the staggered levels.
    - **Acc. excess qty:** This is where the accumulated copies are registered, if you are using such an accumulation type.
    - **Installation Counter reading:** Enter the counter reading at the time of installation.
    - **Latest counter reading:** Enter the latest read date when making a counter registration.
    - **Date:** Lists the latest invoicing of the copies.

Group contract tab

1. Group contract counter 1: Here, you create a group contract where you gather the total quantity of the meter readings, accumulated for a virtual main object. It is important that the main object has accumulation type 1, and the sub-object have accumulation type 3.
    - **Main no.:** Here is where you assign the main object number to the sub-object.
    - **Main:** Tick the checkbox for the main object.
    - **Sub-object:** On the main object, you enter/retrieve the sub-object in the object directory.

Time bank tab

1. Group Time bank fee: Time bank is a contract that means that you sell a number of hours in a time bank balance that is reduced when you report your service order.
    - Debit type: Select 7. Time bank.
2. Group Alternative object number: Here, you could, for example, enter am object number for a customer time bank, i.e. if you want the service call for the customer's copier to be deducted from the customer's time bank.
3. Group Invoice settlement: Here, you specify how the time bank should be settled.
    - Automatic invoice at service call completion: Tick the checkbox if you want to send a new time bank invoice when you complete a service call and the time bank balance exceeds its limit or runs out. Enter the limit for the new invoice in Limit minutes.
    - Include travel time in time bank: Tick the checkbox if you want the travel time to be deducted from the time bank balance.
    - Article no.: Here, you enter the article for the excess minutes.
    - Limit minutes: Here, you enter the number of minutes that must be reached before a new invoice is sent to the customer.
    - Excess minutes: Here, the excess minutes accumulate before being invoiced. That will happen when you use the feature, Invoice excess minutes with contractual invoicing. See below.
    - Price per minute: Enter the price for the excess minutes.
4. Group Time bank: Here, you see the time bank balance and the number of minutes included in it.
    - Included minutes: Here, you enter the number of minutes included in the time bank at time of sale.

- Balance minutes: Displays the number of remaining minutes in the time bank.
- Balance change date: Displays the date when the balance changed.

5. Group contract invoice: Enter the details about the invoice concerning payment.
    - Accumulate Included minutes with Time bank balance in contractual invoicing: Tick the checkbox to add the new contract invoice's minutes to the existing balance.
    - Invoice excess minutes in contractual invoicing: Tick the checkbox to clear the accumulated excess minutes in contractual invoicing.
    - Transfer Included minutes to Balance minutes in contractual invoicing: Tick the checkbox if you want the customer's remaining time bank balance to be lost and to send a new invoice for x number of minutes to the customer.
    - Article no.: Enter the article for the Time bank contract.
    - Fee: Enter Time bank fee.
    - Start date: Enter the starting date for the contract.
    - End date: Enter the end date for the contract.

6. Group Other: Here, you can round off work and travel time entries.
    - Rounded off work time: You can round off the work time to the nearest quarter, half or whole hour.
    - Rounded off travel time: You can round off the travel time to the nearest quarter, half or whole hour.
    - Default travel minutes: Enter a template for travel time in minutes.

Fees tab

Add fees to the object debited in connection with Counter registration or Contractual invoicing. You can also invoice it through your own debit period, e.g. H1, which could be rent debited every quarter.

- Article no.: Enter the article number for the fee.
- Cost price: Enter the cost price for the fee, in cases when they are purchased by a third party.
- Sales price: Enter the sales price for the fee.
- Debit period: Enter the debit period in which to invoice the customer for the fee.
- Month: Enter a contractual period for the fee.
- Text: Describe what the fee concerns.
- Text on invoice: Tick the checkbox to display the text on the invoice.
- Start date: Enter/retrieve a date to start charging the fee from a certain date.
- End date: Enter/retrieve a date to end charging the fee at a certain date.
- Results impact: Tick the checkbox to post the revenue for the object via Reports/Result.
- Latest contract invoice: Displays the latest period for which a fee was invoiced.

Accessories tab

Here, you add the accessories belonging to the object.

- Date: Enter date
- Article no.: Enter/retrieve the article number for the accessory.
- Serial no.: Enter the serial number for the accessory.
- Installation date: Enter the date the accessory was installed.
- Text: Enter your own text for the accessory.
- Warranty date: Enter the expiry date of the accessory's warranty.
- Version: Enter the version, if any, for the accessory.

- Supplier: Enter/retrieve the supplier of the accessory.
- Part of contract: Tick the checkbox if the accessory is part of the contract and at what price list.
- Quantity: How many of the accessories are installed.
- Cost price: Cost price of the accessory
- Sales price: The accessory's sales price.

Group Options per accessory: Add Options per accessory if the accessory has a unit with an article number, etc. that might need service or replacement, e.g. a prom with version and serial number.

Price matrix tab
Here, you can add price matrices on object level, i.e. set your own price for articles pertaining to the object, and whether they apply to service orders, orders, etc.

1. Group Price matrix:

   - Date: Date of price matrix creation.
   - Article no.: Enter/retrieve article number.
   - Price list: Enter/retrieve price list for the article. Not to be combined with Customer price or %.
   - Customer price: Enter net price to customer.
   - %: Enter the % of the sales price to the customer.
   - From date: Enter the date from which the price matrix applies.
   - To date: Enter the date until which the price matrix applies.
   - Not included: Tick the checkbox to exclude the article from Consumption included.
   - Service call: Tick the checkbox to automatically add an article to the service order.
   - Order: Tick the checkbox to automatically add an article to the consumption order.
   - Schedule: Tick the checkbox to automatically add an article to the service order when creating a service call via Work schedule.
   - Base: Tick the checkbox to automatically add an article to the consumption order when creating a consumption order via Base order consumption.
   - Quantity: Enter the desired quantity for the article.

2. Group Base order:

   - Date: Date of Base order creation.
   - Article no.: Enter/retrieve article number.
   - J-D: Select month(s) for the Base order.
   - From: Enter date from which Base order can be created.
   - To: Enter date until which Base order can be created.
   - Quantity: Enter the quantity of this article to be generated.

Settings tab
This tab contains object specific information**.**
There are several alternatives for service scheduling, depending on how the organisation works with service, e.g. if the technicians work with interval service, work schedule, or next service day, etc. The object's service is scheduled under the Settings tab.

Group Interval service:

- Jan-Dec.: Tick the checkbox for the months in which to create the interval service.

- Service call type: Enter/retrieve the service call type you want those interval service calls to be. You can tailor the service call type to fit your purposes. Service call types can be found under Parameters/Codes/Service call types.
- Time: Enter the time of day at which to perform the interval service call.
- Interval year: Use the drop-down list to select how often this interval should occur.
- Start date: Enter/retrieve the date from which to be able to create this interval.
- End date: Enter/retrieve the date until which to be able to create this interval.
- Next service date: Enter/retrieve date for the next service date. You will be asked if you want to update Next service date when completing the Interval service order, and the Next service date will be updated to the next service date, depending on the interval.

Create service orders automatically – Interval service

1. Click **Program** in the menu bar and select **Service/Interval service**.
2. Select the **According to Interval service month** feature.
3. Click the desired month under **Select interval service [Month]** for which to generate service calls, e.g. M creates service orders for all objects that are set to be serviced in May.
4. Click in the **Enter service call type** field and enter/retrieve service call type.
5. Click the list arrow by the **Enter status** field and select the service call queue in which to view the service calls.
6. Click in the **Enter hour** field and enter the time of day at which to start the service call, 8 = eight am.
7. Click in the **Enter time** field and enter the estimated time for the service call, 3 = three hours.
8. Click in the **Text** field and enter the desired service call description, e.g. Maintenance according to service contract.
9. Click **Create order** when you are done. The service calls are transferred to the selected service call queue.
10. Click **Close** when ready.

Group Calculated quantities:

a. Quantity per year: Enter, for example, the number of copies or cups per year.
b. Operational hours per year: Enter the number hours in operation per year.

Group PM: Here, you enter the values that are used if you use the function Create PM service call.

- Days: Enter the number of days for which to generate the PM service call.
- Quantity: Enter the number of copies or cups for which to generate the PM service call.

Group Times: Here, you set Response and Start times, which means that it overrides both Model and Customer response times and indicates how the service order ends up in the service call queue.

- Response time: Enter the number of working hours within which the service call must be started.
- Start time: Enter the number of working hours within which the service call must be completed.

Group start fee service call: Generate a start fee by entering a sum in the Start fee field and selecting an article for the start fee in System parameters/Basic settings/General.

Group Default service call type: If you enter/retrieve a service call type in Default service call type, all service orders will be created with this service call type.

Group Reconditioning: Enter information about whether a second-hand object has been reconditioned.

- Performed: Tick Performed, if the Object has been reconditioned. The object will be searchable in the Second-hand report if you select Reconditioned in the report.
- Technician: Enter/retrieve the technician who performed the reconditioning.
- Date: Enter the date of the reconditioning.
- Text: Here, you take down notes about the reconditioning.

Group service document: Enter a path to a saved service document. There are also quick-keys for opening and printing the document.

Group Installed by technician: Enter the name of the technician who installed the object.

Group Work schedule/Base order: Enter the basic values to be able to create a Work schedule or Base order.

- Work schedule: Tick the checkbox if it is a Work schedule.
- Base order: Tick the checkbox if it is a Base order.
- Service day 1-4: Enter the days of the period in which to perform the Work schedule or Base order. First, however, you must create service days in the calendar. You find it in Parameters/Codes/Calendar and create service day. Then, on the Work schedule/Base order, enter the service days on which you want to visit the object.
- Period: Select period: week, month, quarter or year.
- Del. technician: Enter a technician for those service calls.

Group Latest service: Here, information about the latest service call is registered. If you change the history, this information must also change.

History tab

Displays all the history generated from **Service order**, **Contract** and **Counter registration**, **Consumption order**, applied **Price changes** and **Protocol** for the service orders that had a linked protocol. A protocol can be, for example, a checklist that you want the technician to follow. Double-click a history row to probe the history. See the History section.

Message tab

Create an object message about modifications to perform or other things that you want the technician to check. Those will be visible on the service order and the technician can then check the Completed checkbox when the message has been followed up.

- Date: Today's date is entered for the creation of the message when you go to the next field.
- User: The logged in user is entered when you go to the next field.
- Serial no.: A serial number is assigned when you go to the next field. This series is entered in System parameters/Serial no. If you want to assign your own serial number, you cannot have one in System parameters/Serial no.
- Bulletin no.: Enter any bulletin number here.
- Text: Enter the message here. If it is longer than 240 characters, you can use the lower text box to enter more text (this will not be visible on the service order, however).
- Document: Link the document to the message, for example an adjustment instruction. Use the icons next to the large textbox at the bottom of the page to open or print it.

- Performed: Tick this checkbox when the message has been performed, either on the checkbox or when reporting the service order.
- User: Retrieves the logged in user name when you have performed the message on the service order or ticked the object card checkbox.
- Date: Enters the current date when you tick the Performed checkbox on the service order or object card.
- Status: Set the desired status for the messages.
- Colour: Select colours for the messages in order to distinguish between the different types.
- From date: The date from which you want the message to be visible on the service order.
- To date: The date until which you want the message to be visible on the service order.

Document tab
On this tab, you gather all the documents pertaining to the object. You can enter a path to user manuals or other documents, to access them more quickly.

- Date: The current date is entered when you link the document.
- Document: Enter/retrieve the path to the document. Click the Document list.
- Document type: Enter/retrieve from the document type list. Click the document type list.
- Description: Enter text to describe the document.
- Web access: Tick the checkbox to make the document accessible in WinServ On-line.
- Sign: Enter your signature.
- Folder structure: Enter/retrieve the folder to access when clicking the document list. You can create a folder by clicking the Create folder button.

Forms tab
Lists shortcuts to forms that need filling in or being submitted to customers in connection with service, for example certificates or approval contracts that the customer must fill in. Enter the paths to those forms under Parameters/Forms.

Order tab
Displays all your current service and consumption orders. It is a convenient way of keeping track of the orders if the customer calls, looking for a service call or a product.

Contacts tab
Group Contacts per object: Add all contacts relating to the object. Those contacts can also be exported to Excel or Word for dispatches, etc.

Group Contacts per customer: Lists all contacts relating to a customer. Those have been added in Contacts.

Below, are the descriptions of industry specific tabs that are not detailed in the user manual, but instead are dealt with during training. Any industry not in need of those tabs should hide them in the User groups.

Copier tab
Specific tab for the office supply industry where you store data for a network copier.

Computer tab
Specific tab for the computer industry where you store data about a server or other network units.

Client tab
Specific tab for the computer industry where you store data about all client computers in the system.

Back-up tab
Specific tab for the computer industry where you store data about the system's back-up configuration.

Telecom tab
Specific tab or the data/telecom industry where you store data about the phone exchange and its user.

Cables tab
Specific tab for the computer industry where you store data about the type of cables connecting the network.

Alarm tab
Specific tab for the alarm and security industry where you store data about an installation's configuration.
It contains tabs such as:

- Installation
- Equipment
- Sections
- Characters
- Notes
- Regulation departures
- Instructions
- Areas

Passage tab
Specific tab for the alarm and security industry where you store data about the configuration of an installation's passage system. It contains tabs such as:

- Installation
- Equipment
- Notes

CCTV tab
Specific tab for the alarm and security industry where you store data about an installation's CCTV system. It contains tabs such as:

- Installation
- Equipment
- Notes

Electronics tab
Specific tab for the alarm and security industry where you store data about an installation's electronics system. It contains tabs such as:

- Installation
- Equipment
- Notes

Fire-fighting equipment
Specific tab for the alarm and security industry where you store data about all fire-fighting appliances in an installation.

Door tab
Specific tab for the alarm and security industry where you store data about all the doors in an installation.

Emergency medical alarm tab
Specific tab for the alarm and security industry where you store data about the installation's emergency medical alarms, its scope and what to do in case of an alarm.

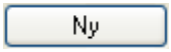
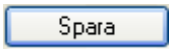
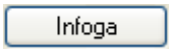
License tab
Here, is where you store all the licenses pertaining to the object.

Delivery address tab
Displays all the object's delivery addresses.

Commission tab
Here, you take down notes about any commission from suppliers concerning the object.

Model

When a new object is added to the WinServ object directory, Model is used to describe the object's main characteristics. Using the model directory, you can also select and retrieve lists and reports about any service object of the same model. You can also create an accessories list, link consumables and create a spare parts list for every model. This facilitates the service work and streamlines completion of service orders.

	Clears the Models view and opens all fields for new registration of a model.
	Saves and exits.
	Saves registered data without exiting the view.
	Closes the Models window.
	Inserts a change for existing models.
	Updates prices from the article directory.
	Copies a model to a new model.
	Copies text from the text tab to a desired model number.
	Changes the counter settings for the selected model.

New model

22. Click **Master data** in the menu bar and select **Models**.
23. Click **New**
24. Click in the **Model no.** field and enter a model number, e.g. M001.
25. Press **TAB** to go to **Article group** and enter/retrieve article group.
26. Press **TAB** to go to **Name** and enter the desired model name.
27. Press **TAB** to go to **Supplier** and enter/retrieve supplier.
28. Press **TAB** to go to **Segment** and enter/retrieve segment.
29. Press **TAB** to go to **Type** and enter/retrieve type.
30. When needed, enter additional information on the desired tab.
31. Click **Save** to save and exit.

Delete model

7. Click **Master data** in the menu bar and select **Models**.
8. Click in the **Model no.** field and enter/retrieve the model to be deleted, e.g. M001.
9. Click **Delete**.
10. You are asked to confirm, click **Yes**.
11. The model is deleted and the view cleared.
12. Click **Close** to exit the window.

Times tab
Here, you enter the base values for where you want to place a service order in the service order queue, i.e. how you want to set the response and start times.

Group Response time target: I.e. when repairs must have been started.

- Field service call with contract: Enter the response time in hours, for customers with a contract for this model.
- Field service call without contract: Enter the response time in hours, for customers without a contract for this model.
- Workshop service call with contract: Enter the response time in hours, for customers with a contract for this model, when submitting it to the workshop.
- Workshop service call without contract: Enter the response time in hours, for customers without a contract for this model, when submitting it to the workshop.
- Response next day at: Enter the time the following day when you want the service call to be carried out.

Group start time target: I.e. when repairs must be completed.

- Field service call with contract: Enter the start time in hours, for customers with a contract for this model.
- Field service call without contract: Enter the start time in hours, for customers without a contract for this model.

Group back jobs: I.e. when a repair has been reported again within the time and copy interval you have entered.

- Days: Enter the number of days after repairs during which the object should function without being classified as a back job.
- Quantity: Enter the number of copies after repairs, for which the object should function without being classified as a back job.

Group PM: Enter the period in days and number of copies, during which the object should function between Pre-Maintenance or maintenance service. This enables you to create service orders with Program/Service/PM service call.

- Days: Enter the number of days during which the object should operate between PMs.
- Quantity: Enter the number of copies for which the object should operate between PMs.

Group Reliability: Enter the number of days and copies during which the object should operate, in order to be classified a reliable.

- Days: Enter the number of days during which the object should operate in order to be classified as reliable.
- Quantity: Enter the number of copies for which the object should operate in order to be classified as reliable.

Group work time: In this grid, enter estimated work time for different service call types for the model.

Counters tab
Configure the counters for the object with this model.

Group Counter:

- Report card counter registration: Tick the checkbox for the counter you want to ”open” in the counter registration for this model.
- Checking registration against service order: Tick the checkbox for the counter against which the system should make a check. The check is made against the counter that the technician reported in the latest service order.
- Statistics: Tick the checkbox for the counter from which you want statistics in the form of reports.
- Completion service order: Tick the checkbox to ”light” the counter that you want the technician to register on the service order.
- Text on report card: Enter your own text for the counter, for example, Report card colour.
- Type: Select the counter type in the drop-down list. Select, for example, RV on the counter report.

Group counter location: Enter the location or the procedure for reading the counter in order for the customer send the correct counter redaing on the report card.

Group fax attachment: Enter/retrieve the path to a document that you want to attach to the faxed report cards.

Product info tab
Enter the product information for the model.

Group Product sheet

- Path: Enter/retrieve the path to a product sheet.
- Web URL: Enter the address to, for example, the supplier’s web site where the product sheets are located.

Group Help file

- Path: Enter/retrieve the path to a help file on the server.

Group rental article

- Enter/retrieve the article number for the rent of this model.

Group Cost price: Enter the Cost price for the model.

Group Default service call type: Enter/retrieve the default service call type for this model’s service calls.

Group Properties: Register the model’s size and weight in order to plan the storing of it in the stock.

Bitmap tab
Enter/retrieve the path to the bitmap image (must be in .bmp format) of the model. You can opt to have a picture of the model, both on the model card and the report card.

Warranty tab

Group Customer warranty: Enter the customer warranty period for the model, in number of days.

Group Supplier warranties

- Transport included: Tick the checkbox if the supplier pays for transport.
- Work included: Tick the checkbox if the supplier pays for labour cost.
- Parts included: Tick the checkbox if the supplier pays for spare parts cost.
- Return form: Enter/retrieve the path to the return form.
- Return form: Enter the address to the supplier's web site where the return form is located.
- Garanti ersättning: Här kan du ange ersättningen du får från leverantören vid garantijobb på denna modell.
- Garanti artikelnr: Här kan du ange/hämta artikelnumret för ersättning för garantijobbet.
- Warranty comp. Customer no.: Enter/retrieve the customer number of the customer who is to pay compensation for the warranty service call.

Debit tab
Enter an article for the work cost of the model. You can also update prices from the article directory for all models.

Points tab
Here, you weigh your objects, i.e. instead of viewing whether a technician has performed a number of service calls, you can assign a number of points. Some objects may take longer than others. This makes it easier to create a fair bonus point system for the technicians.

Group service call points: If you assign the service call points, you get a static list of those points. The report can be found under Reports/Statistics/Service call points.

Group Service call points per service call type: If you assign service call points here, you can create your own service call types and assign points to them. The report can be found under Reports/Statistics/Service call points per service call type.

Group Object points: Assign an object point to the model in order to weigh your objects. The report can be found under Reports/Lists/Master data/Object/Points.

Consumption/accessories tab
Add the consumables belonging to the model. You do the same with the model accessories but in Spare parts, you can create a list from the history.

Consumption tab:

If you have made changes to your prices in the article directory, you must update the prices on the model card with this button.

Click this button if you want the consumables for this model to be available in the spare parts list as well.

Spare parts tab:

Click this button to erase the spare parts list for all models.

Click this button to erase the spare parts list only for this model.

Click this button to create a spare parts list from the history, i.e. the history of previously completed articles for this model. With this button, you can either create a spare parts list for this model only, or for all of them. You can also determine a date from which you want to create the spare parts list.

Click this button to update the spare parts' descriptions if you have changed them.

Texts tab
If you want to add specific text on the report cards for this model, you enter it here. You can change the general text on the report card in System parameters/Texts/Report card.

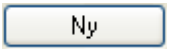
Notes tab
Here, you can take down your own notes about the model.

Message tab
If you want to create a message for the model, for example a bulletin from the supplier that should be visible on the service order, you register it here.

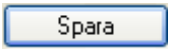
Object tab
Lists all the objects available for this model.

Technicians

WinServ has a directory of technicians. Here, you register technician specific information.



Clears the Technicians view and opens all fields for new registration of technicians.



Click **Save** to save and close.

Click **Update** to save data without closing the view.

Click **Close** to exit the Customer view.

Click Move technician stock to mode a technician's stock to another technician, for example when a technician leaves the company.

Click Copy order points, Stock points or Shelf. Use this feature to use another technician's order points, etc. as a template.

Click Erase Order points, Stock points or Shelf. Use this feature to erase a technician's OP, SP or Shelf.

Click Optimise stock. This feature erases technician stock transactions without a Stock balance, OP Order point, SP Stock point, or Shelf.

New Technician

- Click **Master data** in the menu bar and select **Technician**.
- Click **New.**
- Register information in the Name and Address fields.
- On the **Information** tab. You register all the basic information about the technician.
- When you are finished, click **Update** to save the information.
- On the **Technician stock** tab, you can view the selected technician's stock.
- On the **Training** tab, you register the technician's courses and diplomas, etc.
- On the **Bitmap** tab. You can, for example, store a picture of the technician.
- On the **Notes** tab. You can enter the technician's birthday or car registration number, etc.
- On the **Time transactions** tab. You can view the technician's time transactions, e.g. vacation, training, sick leave or absence due to sick child. This requires registering the information under **Time registration**.
- On the **Fixed message** tab. You can add a message for the technicians.
- On the **Time clock** tab. You can see the working hours of technicians. This requires the Time clock feature being active.
- On the **Message** tab. You can enter a message to a specific technician to be displayed on the service order.
- On the **Price matrix** tab. Here, you add a price for a service or article concerning this specific technician.
- On the **Web** tab. Here, you determine which queues to display to the technicians when they use the web based WinServ online.
- Click **Save** to save and exit.

Information tab
Here, you register technician information.

- District: Enter/retrieve a district for the technician in order to facilitate selections in the service order queues or reports.
- Team: Enter/retrieve the team to which the technician belongs.
- Colour: Assign a colour to the technician in order to view his service calls more easily in the queues.
- Working hours/day: Enter the number of hours per day the technician should work. If it says 0, the technician is inactive.
- Sales rep: Link the sales rep to a sales number in order for the technician to place an order and also be assigned as the sales rep in the reports.
- Phone: Enter the technician's home or work phone number.
- Fax: Enter the technician's fax number.
- Mobile: Enter the technician's mobile phone number.
- E-mail: Enter the technician's e-mail address.
- E-mail SMS: Enter the technician's e-mail address to your mobile phone provider's message service (check with your provider). This enables you to send a service order via SMS.
- Employment date: Enter the technician's date of employment.
- Leaving date: Enter the date when the technician left the company.
- Stock: Enter the technician's default stock for his service orders.
- Bonus: Enter the technician's bonus for making additional sales and ticking the Technician bonus checkbox on the service order's, Other tab.
- Project: Enter/retrieve the project to which the technician belongs.
- Time clock password: Enter a password for the technician's time clock.
- IN: Registers the time you check in.
- Article service call: Enter/retrieve an article for the work cost of the technician. When registering the time on a service call with this technician, this article is automatically added to the invoice row.
- Article travel: Enter/retrieve an article for the travel cost of the technician. When registering the time on a service call with this technician, this article is automatically added to the invoice row.
- Article km: Enter/retrieve an article for the travel distance cost of the technician. When registering the time on a service call with this technician, this article is automatically added to the invoice row.
- Internal code: Enter/retrieve the technician's internal code; i.e. all orders with this technician ends up in the folder to which the path of the internal code points. Internal codes can be found under Parameters/Object/Internal code.
- Region: Enter/retrieve the region to which the technician belongs, for easier selections.
- Service call type: Enter/retrieve the service call type assigned to the service order when selecting this technician.

Group Internal cost: If you want the technician to have other internal costs than the ones you registered in System parameters/Times cost.

Group Delivery address: Enter, for example, drop points for technician spare parts.

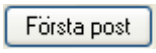
Technician stock tab
Displays the technician's stock, Order points and Ordered quantity, etc.

Training tab
Display the courses the technician has attended.

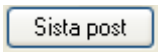
Use this button to add training courses for a technician.

Use this button to copy training courses from one technician to another.

Use this button to delete a technician's training courses.



Click First item to view the first listed training course.



Click Last item to view the last listed training course.

Bitmap tab
Enter/retrieve a path to the folder where you store pictures of the technician.

Notes tab
Here, you can take down notes about the technician.

Time transactions tab
Displays all the time transactions for the technician. You can print reports of those from Reports/Time transactions.

Fixed message tab
Enter a fixed message to the technician. This message is displayed in the technician list when selecting a technician for a service order.

Message tab
Add a message to the technician.

Price matrix tab
Add a price matrix on the technician level. An article may have different prices depending on the technician selected for the service order.

Web tab
Select the service call queues you want to be visible to the technician in WinServ Online service, by ticking the checkboxes. You can also tick the checkbox, "May change other's time registration" if you want this technician to be able to do so.

Chapter 6.

Parameters

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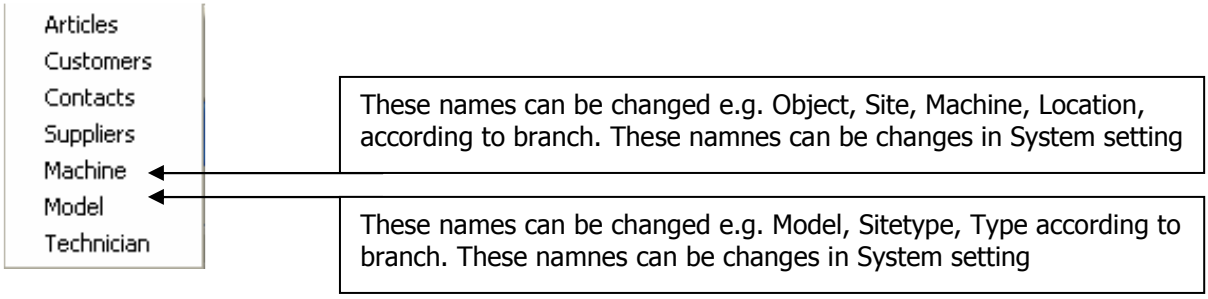
Forms

PARAMETERS - GENERAL

Parameters are fixed settings with information that the system needs to function. Registered information can also facilitate the daily routines, e.g. the parameters are not changed often, but are normally registered when the system is implemented for the first time.

The **Parameters** menu contains settings for:


Articles
Customers
Contacts
Suppliers
Machine
Model
Technician
These names can be changed e.g. Object, Site, Machine, Location, according to branch. These namnes can be changes in System setting
These names can be changed e.g. Model, Sitetype, Type according to branch. These namnes can be changes in System setting

ARTICLE PARAMETERS
The systems allows for grouping articles of the same type. There are numerous benefits to grouping articles. It allows you to select articles that belong together, in order to perform analyses and change the settings, such as price increases, etc. The Group articles feature can be found in most business systems that have an article directory.
WinServ installations that use the Customer Client web service, use article groups for making quick selections in the web shop interface.

The following settings are available for article parameters:

- Article groups
- Unit directory
- Main article groups
- Campaigns

Article groups
Use the same groups as in the business system, or create your own. The following groups are recommended; Service, Product, Consumption and Spare part.

Add article group

1. Click **Parameters** in the menu bar, select **Articles** and then **Article groups**.
2. Click **New.**
3. Click in the **No.** field and enter the desired **code**, e.g. 01
4. Press **TAB** to go to the **Name** field and enter the desired name, e.g. Product.
5. Click **Save** to save.

Link article group to Main article group

1. Click **Parameters** in the menu bar, select **Articles** and then **Article groups**.
2. Click in the **No.** field and enter/retrieve the desired **article group**, e.g. 01
3. Click in the **Main group** field and enter/retrieve the desired main group.
4. Click **Save** to save.

Unit directory
WinServ has a unit directory that is used if the article contains, say, six units and you want to sell it by the piece. You create a unit directory that contains, for example, **Box6**, which is short for Box containing six pieces, and a unit called **pc** which is short for piece. In the article directory for the article, you indicate that the article is a Box6 in the **Unit** field. On an order, you enter the article on an order row and replace the unit with **pc** in order for the program to divide the price by six.
Suggestions: Package 6 pcs, Bag 20 pcs, Pallet 24 pcs, Unit 1 pc., Box 12 pcs.

Main article groups
It is used when you have several article groups of the same type that belong together, for example the main group Beverages, with the sub-groups Coffee, Tea and Soda.
Use the same groups as in the business system, or create your own.

Add Main article group

1. Click **Parameters** in the menu bar, select **Articles** and then **Main article group**.
2. Click in the **No.** field and enter/retrieve the desired **article group**, e.g. 01
3. Click **Name** and enter the desired name for the group.
4. Click **Save** to save.

Campaigns
In WinServ you can create campaigns for customers who use Customer online, or who order over the phone. Different campaign articles can be linked to those campaigns. You can also Import and Export campaigns.

Create campaign
1. Click **Parameters** in the menu bar, select **Articles** and then **Campaigns**.
2. Click on an empty row and select a campaign number.
3. Enter the name of the campaign.
4. You can also enter the dates between which the campaign should run.
5. Enter the date for the creation of the campaign.
6. Enter/retrieve the sales rep who created the campaign.
7. Click **Save** to save.

Campaign articles tab
Here, you link the campaign to articles and, if you want to limit the campaign to certain customers, customer numbers.

Add Campaign article
1. Click **Parameters** in the menu bar, select **Article parameters** and then **Campaigns/Campaign articles**.
2. Enter date and press **TAB**. Enter or retrieve an article in the article directory by clicking Article no. >>. Select any customer numbers in the same way, and enter the price for the campaign article.
3. When you have used **TAB** to go through the row, the article is saved and you are ready to add the next one.
4. Click **Close** to exit the Campaigns view.

CUSTOMER PARAMETERS
Suggested customer parameters.

Terms of payment: net per 10 days, net per 20 days, net per 30 days, Cash, Cost estimate

District: Information is retrieved from the business system. Alternatively, create your own.

E-mail recipient: Here, you list e-mail recipients for the WinServ mail sender.

Company types: 10 Business customer, 20 Public sector, 30 Private customer, 40 Limited company

Category: 10 Bonnier, 20 Familjebostäder, 30 SEB, 40 The Police

Customer contract: Here, you enter customer contracts that can be linked to a customer.

Customer price list: Here, you enter price lists that can be linked to a customer.

Delivery terms: 1 ex our stock, 2 free shipping, 3 picked up by customer

Method of delivery: 1 Technician, 2 Courier, 3 Post, 4 Picked up.

Country codes: Here, you add the country codes. This is useful for customers that have overseas operations.

Post code table: The PAR (Postal services Address Register) post code table is downloaded by WinServ before delivery.

Project types: Here, you add the different project types. This enables you to link different projects under the same type, in reports.

Project groups: Here, you add different project groups. This enables you to link different projects under the same group, in reports.

Project: 10 BPA Måleri, 11, Arboga kommun, 12 Huddinge sjukhus

Regions: 10 Northern Sweden, 11 Middle of Sweden, 12 Southern Sweden

Sales rep: Information is retrieved from the business system. Alternatively you create your own.

- **General tab:** Here, you enter the basic values for the sales reps.
- **Contact information tab:** Here you list the sales rep's contact information.
- **ToDo budget tab:** Here , you enter certain key values for the sales rep, e.g. number of phone calls, customer visits, etc.
- **Sales rep budget tab:** Here, you generate a budget for each sales rep for different periods and article groups.
- **Article commission tab:** Here, you enter the commission per article for each sales rep.
- **Article group commission tab:** Here, you enter the commission per article group for each sales rep.
- **Advanced tab:** Here, you find features like e.g. Link sales rep to post code/customer or object and if a sales rep should receive an e-mail when his object is reported.

Sales rep teams: Here, you create different teams for sales reps, e.g. North, South, City

Campaigns: Here, you create a campaign for the sales rep.

- **Campaign articles:** Here, you link the campaign to articles and, if you want to limit the campaign to certain customers, customer numbers.

Currencies: Here, you register different currencies by unit, buy and sell rate.

CONTACT PARAMETERS
Suggested customer parameters.

Reason codes: 1. Best sales rep, 2. Right price level, 3. Best service plan,
4. Geographical location, 5. Good customer relations.

Department codes: 1 Accounts department, 2 Purchasing department, 3 Company management.

Activity codes: 1 Phone call, 2 Customer visit, 3 Meeting, 4 Offer.

Activity groups: Activity groups are used for linking a number of activity codes in order to be able to search for groups in reports.

Position codes: 1 CEO, 2 CFO, 3 Service manager, 4 IT manager.

Hobby codes: 1 Golf, 2 Mountaineering, 3 Bee keeping, 4 Gardening
Campaigns: 1 Easter campaign, 2 Christmas campaign, 3 Digital campaign.

Contact categories: 1 VIP, 2 Normal, 3 Prospect

Customer activities: 1 Open house, 2 VIP viewing, 3 Golf

Competitors: 1 Canon, 2 HP, 3 KonicaMinolta.

Competitor models: 1 HP 9850, 2 KM 8050, Xerox 8580

Product interest codes: Here, you list the products that the contact may be interested in.

Result codes: 1 Brought home the deal, 2 Lost the deal, 3 Wait and see.

SNI codes: Can be purchased from PAR and imported.

OBJECT:
Proposed object parameters.

Financing contract types: 1 Buy, 2 rent, 3 lease.

Debit periods: Here, you create debit periods for contractual invoicing. There are existing templates.

Internal codes: Those are created if you have several different companies using the same WinServ. It allows you to till create paths to different folders where your orders are stored and allocated to different companies in the business system.

Status: 1 active, 2 passive, 3 completed.

Post code table: Post code table from the Postal service is imported by WinServ at delivery.

Location codes: C Customer, S Stock, E Exhibition.

Travel zones: 1 Inside city limits, 2 Outside city limits, Distance in km.

Service contract types: 01 Straight copy debiting, 02 Straight copy debiting, including toner, 03 minimum quantity.
04 Minimum quantity including toner, 05 Fax agreement, 06 Printer contract

- Tab, Response time per service contract type:
- Price matrix articles tab: Here, you add the discount for articles that you want the customer to have with a certain service contract type.
- Price matrix article groups tab: Here, you add the discount for article groups that you want the customer to have with a certain service contract type.
- Advanced: Here, you update the objects after changing the service contract types.

Protocol: Here, you create protocols and protocol rows in which the technicians can tick off what they carry out.

Index: Here, you enter different indexes for the indexation of service contract prices. Those are regulated by the unions and are managed by the WinServ administrator. Select an index on the object card in order to manage the contract price from there, when using contract invoicing.

Additional codes: Here, you enter additional codes for the object, e.g. services.

Alarm settings

Alarm settings will only be visible to companies who have chosen the security industry. That is done under System settings/Basic settings/Industry. Alarm setting will be displayed under Parameters/Object/Alarm settings.

TRANSFER TYPES

Transfer types

Here, you register the ways in which an installation can transfer information, through the ordinary phone network, mobile telephony or another way. Below are some examples of transfer types:

- PSTN Land-line telephony
- GSM Mobile telephony
- GPRS Mobile telephony
- 3G Mobile telephony
- Multicom Telecom network for secure alarm transfer

All Transfer types

1. Click **Parameters**, **Installation**, **Alarm settings** and select **Transfer types**.
2. Click in the first row and enter desired **transfer type**, e.g. PSTN
3. Press **TAB** to get to the next row.
4. **Repeat** until completed.
5. Click **Save** to save and close.

Delete Transfer type

1. Click **Parameters**, **Installation**, **Alarm settings** and select **Transfer types**.
2. Select the **transfer type** you wish to delete
3. Click **Delete**.
4. The **Confirm** dialogue is shown.
5. Click **Yes** to delete.
6. Click **Close** to exit.

Transfer protocol

A transfer protocol comprises technical instructions for alarm transfers. A protocol is the language in which transmitter and receiver communicate. Some common languages for transferring alarms in Sweden are:

- SIA
- Robofon
- Multicom

Add Transfer protocol

Click **Parameters**, **Installation**, **Alarm settings** and select **Transfer protocol**.

1. Click in the first row and enter the desired protocol, e.g. SIA

2. Press **TAB** to go to the next row.
3. Repeat until completed.
4. Click **Save** to save and close.

Delete Transfer protocol

Click **Parameters**, **Installation**, **Alarm settings** and select **Transfer protocol**.

1. Select the protocol you wish to delete.
2. Click **Delete**.
3. The **Confirm** dialogue is shown.
4. Click **Yes** to delete.
5. Click **Close** to exit.

Receiver

The WinServ receiver is the receiver in the perspective of the alarm centre. To add new receivers, you need to add alarm centre and transmitter codes to the system. When the alarm centre and its transmitter codes have been added to the system, you register the desired number of receivers.

Descriptions of the terms:
Receiver: A unique ID for every new receiver.
Alarm centre: The alarm centre to which the installation is linked.
Transmitter series: The series/line you received from the alarm centre. There is more information about transmitter codes and series in the Supplier section.
Protocol structure: The protocol structure of the alarm centre contains information about your customer number, your customer's customer number and the characters of the alarm centre.
Protocol: Sia, Robofon, etc. See the Protocol section.
Primary: The phone number that the installation calls when activated.
Secondary: The phone number called y the installation if the primary number is busy.
Character: The information that the installation transmits when activated. Each alarm centre has its own character terms. Contact your alarm centre for correct characters and character texts.

Add receiver

1. Click **Parameters/Installation/Alarm settings/Receiver**
2. Click **New**
3. Click in the **Receiver** field and enter a name for the receiver, e.g. **LC 001**.
4. Enter/select the desired alarm centre in the **Alarm centre** field.
5. Click in the field **Transmitter series** and enter a number for the desired series.
6. Click in the **Protocol structure** field and enter the protocol structure.
7. Click in the **Protocol** field and select the desired protocol, e.g. SIA
8. Click in the **Primary** field, and enter the desired phone number.
9. Click in the **Secondary** field, and enter the desired phone number.
10. Click on the first row under **Character** and enter the desired character, e.g. 02 for assault.
11. Press **TAB** to go to the next field and enter the desired **Character text,** Assault.
12. Press **TAB** to go to the next row. Repeat until the desired number of characters have been registered.
13. Click **Save** to save and close.

Delete receiver

1. Click **Parameters/Installation/Alarm settings/Receiver**
2. Click in the field by **Receiver** and enter/select receiver.
3. Click **Delete**.
4. The **Confirm** dialogue is shown.
5. Click **Yes** to delete.
6. Click **Close** to exit the window.

Object types
Examples of objects: House, Business premises, Crèche, Sports facilities, Office, Warehouse, etc.

Add object type
1. Click **Parameters/Installation/Alarm settings/Object type**
2. Click in the first row and enter the desired object, e.g. Business premises
3. Press **TAB** to get to the next row.
4. Repeat until completed.
5. Click **Save** to save and close.

Delete Object type
1. Click **Parameters/Installation/Alarm settings/Object type**
2. Select the protocol you wish to delete.
3. Click **Delete**.
4. The **Confirm** dialogue is shown.
5. Click **Yes** to delete.
6. Click **Close** to exit.

Rules and regulations

Rules and regulations
In order for an installation to be approved, it must meet a number of security regulations. Those regulations are described in various sets of rules, e.g. ”SSF 130:6”. If an installation does not fulfil the regulations, it cannot be approved. In WinServ, you register the necessary rules and regulations for the documentation of the installations. Any departure from regulations are documented in Regulation departures. Follow the instructions below to create the rules and regulations that your organisation needs.

Add Rules and regulations
1. Click **Parameters/Installation/Alarm settings/Rules and regulations**
2. Click in the first row and enter the desired object.
3. Press **TAB** to go to the next row.
4. Repeat until completed.
5. Click **Save** to save and close.

Delete Rules and regulations
1. Click **Parameters/Installation/Alarm settings/Rules and regulations**
2. Select the rules and regulations you wish to delete.
3. Click **Delete**.
4. The **Confirm** dialogue is shown.
5. Click **Yes** to delete.
6. Click **Close** to exit.

Regulation departure texts
In the system, you can register texts for regulation departures, that can be recycled again and again. Every row can contain 112 characters.

Add Regulation departure texts

1. Click **Parameters**/**Installation**/**Alarm settings**/**Regulation departure texts**
2. Click in the first row and enter the desired text. Every row can contain a maximum of 112 characters.
3. Press **TAB** to go to the next row.
4. Repeat until completed.
5. Click **Save** to save and close.

Delete Regulation departure texts

1. Click **Parameters**/**Installation**/**Alarm settings**/**Regulation departure texts**
2. Select the text row you wish to delete
3. Click **Delete**.
4. The **Confirm** dialogue is shown.
5. Click **Yes** to delete.
6. Click **Close** to exit.

SSF Classes
WinServ assists you in calculating back-up time for energy consumption. In order the system to be able to calculate and create a energy consumption report, you must enter the limits for each SSF class. The system uses those limits in the calculation and when printing energy consumption reports from the installation card.
Under SSF classes, you enter the limit in minutes for every SSF class, i.e. how many minutes an installation should remain active when battery powered. The system has four classes; Class 1, Class 2, Class 3 And Class 4. Enter the number of minutes for each class.

Enter limit for battery-powered operation in minutes per SSF class

1. Click **Parameters**, **Installation**, **Alarm settings** and select **SSF classes**.
2. Click **New.**
3. Click in the **Class** field, and enter **1**.
4. Press **TAB** to go to the Minutes field.
5. Enter the desired number of minutes for Class 1, e.g. 720.
6. Click **Save** to save.
7. Repeat steps 1 – 6 above to enter a time limit for all four SSF classes.
8. Click **Close** when you are done.

Passage
Passage concerns security products like Code locks, Entry phones, Card readers, Cards and Badges, etc.

Add Passage type
1. Click **Parameters**, **Installation**, **Alarm settings** and select **Passage**.
2. Click **New.**
3. Click in the **Class** field, and enter **01**.
4. Press **TAB** to go to the **Name** field.
5. Enter the desired passage type, e.g. Code lock.
6. Click **Save** to save.
7. Repeat steps 1 – 6 above to add the desired passage types.
8. Click **Close** when you are done.

CCTV
CCTV includes video surveillance via CCTV and TCP/IP

Add CCTV type
1. Click **Parameters**, **Installation**, **Alarm settings** and select **CCTV**.
2. Click **New.**
3. Click in the **No.** field.
4. Enter for example **A01**, where A can mean analogue technology.
5. Press **TAB** to go to the **Name** field.
6. Enter the desired CCTV type, e.g. Analogue video surveillance.
7. Click **Save** to save.
8. Repeat steps 1 – 7 above to add the desired CCTV types.
9. Click **Close** when you are done.

Electronics
WinServ uses the Electronics classification for all installation that run on electricity, but are not classed as Alarm, Passage, CCTV, etc.. Examples include Blinds, IR-lighting, etc.

Add Electronics types
1. Click **Parameters**, **Installation**, **Alarm settings** and select **Electronics**.
2. Click **New.**
3. Click in the **No.** field.
4. Enter, for example, **01**.
5. Press **TAB** to go to the **Name** field.
6. Enter the desired name, e.g. Blinds.
7. Click **Save** to save.
8. Repeat steps 1 – 7 above to add the desired electronics types.
9. Click **Close** when you are done.

MODELS
Proposed parameters for the model.

Suppliers: 01 Tech data, 02 Hewlett Packard, 03 KonicaMinolta

Product areas: 01 Fax, 02 Printer, 03 Analogue copier, 04 Digital copier, 05 Coffee machine

Segments: S1 0-19 copies/min, S2 20-39 copies/min, S3 40-59 copies/min, S4 60-79 copies/min, S5 >80 copies/min.

TECHNICIAN PARAMETERS
Suggested Technician parameters.

Technician team: 01 Team South, 02 Team North, 03 Team City, 04

CODES
Proposed codes

Task codes: 10 Feeding, 20 Paper tray, 30 Fixer, 40 Duplex, 50 Electronics, 60 ADF, 70 Finisher.

Deviation codes: 01 Manufacturing flaw, 02 DOA, 03 Accident.

Deviation codes actions: 01 Ordered new part, 02 Replace, 03 Ordered new + contacted insurance company

Document types: 01 Presentation, 02 Offer, 03 Exploded view

Service call priority: A High priority, B Normal priority, C Low priority.

Service call types: F Field job, M Maintenance service, R Return visit, S Scheduled, P Phone support, N Network

Service call status: Here, you can change the status queues and give them other names than you have at present, e.g. Return could be called Wait and see.

Service call time types: 01 OB1 17,00-18,00, 02 OB2 18:00-20:00, 03 OB3 20:00-00:00, 04 On call

Calendar: Here you define the days as working days or delivery days. You can also enter the week number each day is part of. This should be done every year, as it is not automatic.

Time types: 01 Vacation, 02 Sick child, 03 Ill, 04 Sabbatical, 05 Training.

Cost centres: Here, you create the cost centres (ensure that they match the business system's).

Cost unit: Here, you create the cost units (ensure that they match the business system's).

Object: Here, you create the objects (ensure that they match the business system's).

Reason codes: Here, you add the various cause codes that are used for completing the service order's spare parts; e.g. 10 Manufacturing flaw, 11 User error

Quality codes: 1. Response time met 2. Response time not met 3. Customer delayed service

Return status: 1. Object sent to supplier 2. Object received by supplier 3. Object in repair

Service log codes: Your own code for describing the process for a specific case.

Action codes: 10 Feeding, 20 Paper tray, 30 Fixer, 40 Duplex, 50 Electronics, 60 ADF, 70 Finisher.

Forms

A form is a document that is linked to WinServ's directory. All forms are found under the Forms tab. Click the desired form to open it in the program where it was created. When a form is opened, the linked information is retrieved; e.g. customer name, address, phone number, etc. It can also be more complex information about, for example, an installation certificate used in the security industry. The Forms tab is found for:

- Contacts
- Customers
- Alarm forms
- Object
- Offers
- Service order

Add form

1. Click **Parameters** in the menu bar and select **Forms**.
2. Click on the first empty row and enter the name of the form, e.g. Offer template.
3. Press **TAB** to go to the next field.
4. Press **F4** to view the Open window.
5. Browse your way to the correct folder, select the desired file and click **Open**.
6. Press **TAB** to go to the next field.
7. Press **F4** to view the Select window.
8. Select the location from which the to activate the template and click **Ok**. If you want the template to be available on the tab when you are working on a customer, you select Customer, if you want it to be an offer template, select Offer, etc.
9. Press **TAB** until you come to a new row.
10. Click **Close** when you are done.

Chapter 7.

System

Contents:
Users
User groups
System parameters
Directory usage
External programs

System

In System, you manage all user groups and users, as well as other system-critical information.
You can make global information transfers, updates and import/export text files.
You can monitor directory usage and create systems bases for using WinServ.
The system administrator often has access to System.

USERS AND USER GROUPS - GENERAL

In order to use the system, you have to have a user account. The account is defines with a user name and a password. Normally, the system administrator or someone else with administrator's rights create a new user. When setting up an account, you define the rights and system settings for that account. The settings should be based on the account-holder's job description. The access rights in the system are always set on user level and can be supplemented with the settings for the user group.
Several users with similar job-descriptions can belong to the same user group. With the User group feature, the administrator can define the views and features available to a certain group of employees; a group shares the same graphic interface, views and features.

User groups

The User groups view offers the following:

- Create new user groups.
  Every group is assigned a group number. Default groups in the system are; Service, Order receiver, Economy and Management.
- Select the views/tabs to which a particular user group should have access.
  There are five tabs that all belong to the Master data view: Object, Customers, ///Contacts, Articles and Models.

Your administrator can change the name of the first tab from Object to machine, installation or other.

System/System parameters/tab Basic settings and field Object.
Click in the **Object** field, and enter the desired name.

Step-by-step User groups

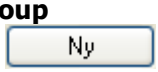
Open the User groups view:

1. Click **System** in the menu bar.
2. Select **User groups**
3. The User groups view is opened.

View the User groups list

1. Click … in the **Group no.** field.
2. The list of existing groups is opened.

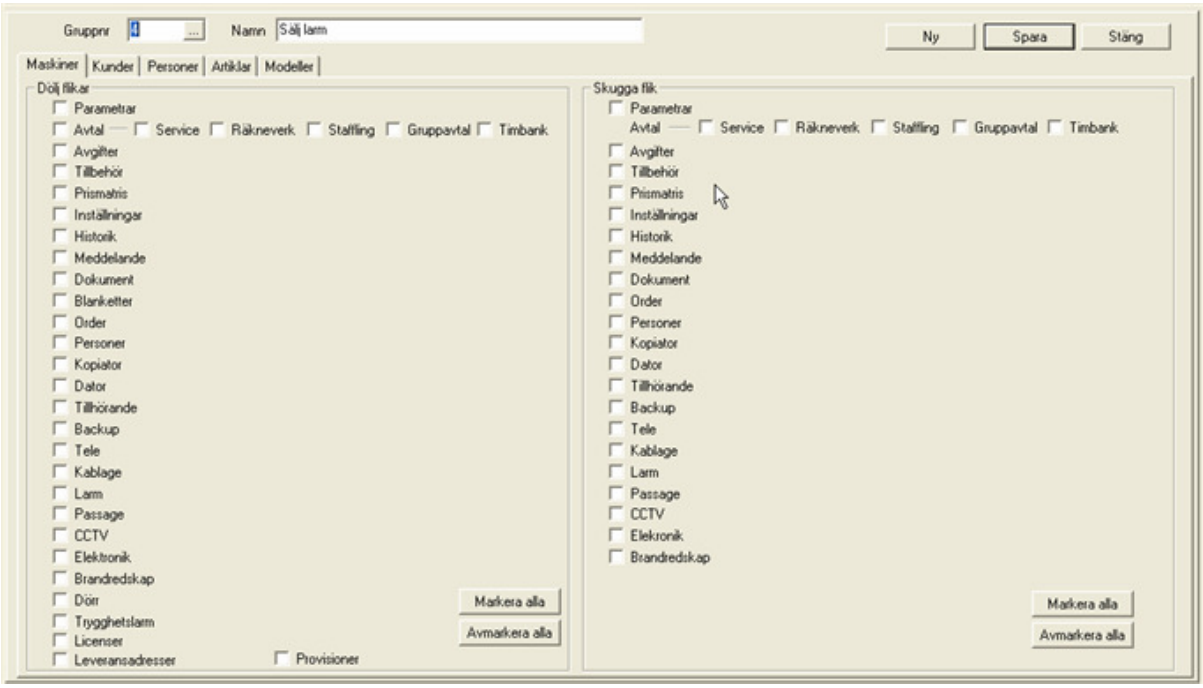
Add new user group

1. Click **New** 

2. Click in the **Group no.** field and select the desired number, e.g. **03**.
3. Click in the **Group name** field and enter the desired name for the group, e.g. Service.
4. Click **Save.**

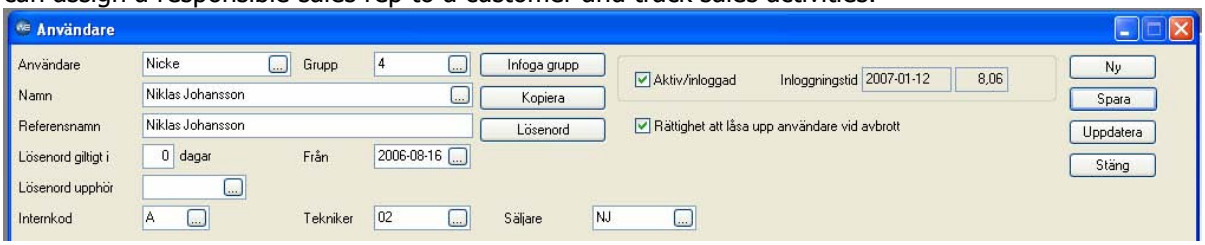
Hide tabs for the desired user group

1. Click in the **Group no.** field.
2. The list of existing groups is opened.
3. Select the desired group and click **Ok**.
4. Click the desired tab, e.g. **Customers**.
5. **Select** the tabs to hide.
6. Click the next tab, e.g.. Articles and repeat.
7. Click **Save.**



Users

In the Users view, you define the access rights to the system. The view consists of a number of fields and tabs where the administrator sets the parameters to match the job description and skill of the user.
Besides access rights, an account can also be linked to two directories, on for technicians and one for sales reps. Those directories are completely separate, but a user can be linked to both. Through the technician directory, the system can track technician activities and through the sales rep directory, it can assign a responsible sales rep to a customer and track sales activities.



Open the User view:

1. Click **System** in the menu bar.
2. Select **User**.
3. The **User** view is displayed.

View the Users list

1. Click [...] in the **User** field.
2. The user list is opened.

Add new user

This can be done in two ways. Either, you copy an existing user whose settings should be shared by the new users. This eliminates the need to register all the tabs again, or, alternatively, you create a new user.

Copy User:

1. Click the [Kopiera] button and enter/retrieve a user that belongs to the same group and configuration as the new user.
2. Enter the new user's user name and password.
3. Click OK.
4. Enter/retrieve the new user and ensure everything is correct.
5. Click the [Lösenord] button and enter the password twice.
6. Click **Save.**

New User:

1. Click **New** [Ny]
2. Click in the **User** field and enter the desired name, e.g. Anna.
3. Click [...] in the **Group** field.
4. Select the desired group from the list and click **Ok**.
5. Click in the **Name** field and enter the user's full name.
6. Press **TAB** to go to the next field, contact names are automatically retrieved.
7. Click [...] in the **Technician** field if the user is a technician.
8. Select a technician from the list and click **Ok**.
9. If the user is a sales rep, click [...] in the **Sales rep** field.
10. Select a sales rep from the list and click **Ok**.
11. Click the [Lösenord] button and enter the password twice.
12. Click **Save.**

Unlock user
Only a user with administrator's rights can unlock accounts.

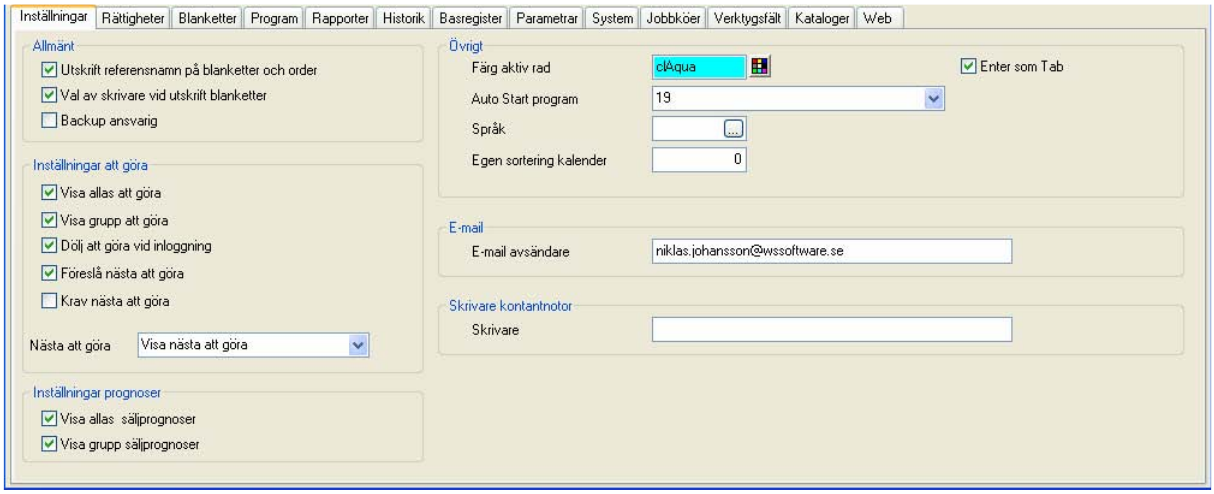
1. Click … in the **User** field.
2. Select the desired person from the list and click **Ok**.
3. Untick the checkbox by the **Active/logged-in** field.
4. Click **Save.**

Your administrator can pass on the right to unlock users at interruptions. This means that a number of people in the company can unlock accounts, even if they do not have administrator's rights.

System/User/ tick the Right checkbox to unlock a user at interruptions.

Settings tab
This tab contains four areas of user adaptation:

- General
- Other
- E-mail
- Orders



Picture: Settings

General

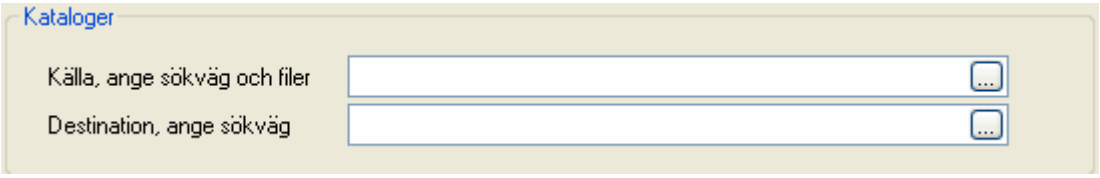
Printing contact names on forms and orders
Ticked: The contact names will be displayed on forms and orders registered or printed by this user.
Unticked: No contact name is printed.

Selecting printer when printing forms
Ticked: The user can select a printer. The normal Windows dialogue is displayed.
Unticked: Automatically prints on the selected default printer. This is used to eliminate an extra dialogue. It is recommended when a person always uses the same printer. In addition, unique settings can be made for the printer if, for example, it is a matrix or ink jet printer that needs special settings. Settings are made on the Forms tab. Unique settings for each user include ”No. of copies” and ”Margins”.

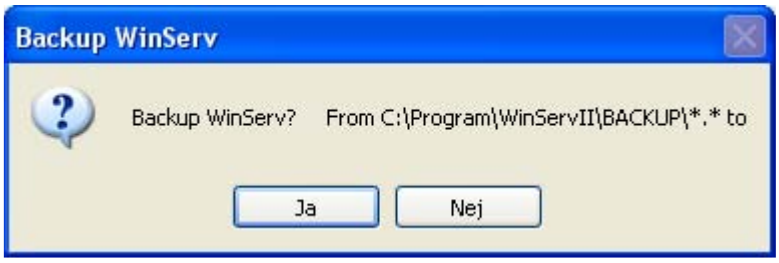
Back-up manager
This is used by companies that do not have an automated backup feature.

Ticked: Activates the back-up feature when WinServ is closed. It is ticked for the person responsible for back-ups. The feature requires the following system parameters settings to work:

1. Click System
2. Click System parameters
3. Select Back-up
4. Click in the field, ”Source, enter path and files” and select the WinServ data folder.
5. Click in the field, ”Destination, enter path” and browse to the desired back-up folder.
6. Click **Save.**



Picture: Back-up settings.



Picture: Appears to the back-up manager when he/she exits WinServ.

Unticked: Deactivates the Back-up feature.

Settings ToDo

View everybody’s ToDo
Ticked: Enables the user to see everybody’s ToDo
Unticked: Deactivates the feature. The field is greyed out.

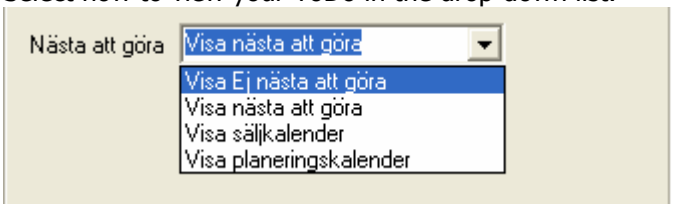
View group ToDo
Ticked: Gives the user the tight to view other group’s ”ToDo” list in the ToDo window.
Unticked: Closes the features, Change group and View Group ToDo in the ToDo window. The fields are greyed out.

Hide ToDo when logging in
Ticked: ToDo is not displayed when WinServ is started.
Unticked: WinServ starts up and displays the ToDo list.

Suggest next ToDo
Ticked: When completing a ToDo item, the window displays Next ToDo. The user **can** close the window without registering a ToDo.
Unticked: The feature is deactivated.

Require Next ToDo
Ticked: When completing a ToDo item, the window displays Next ToDo. The user **cannot** close the window without registering a ToDo.
Unticked: The feature is deactivated.

Next ToDo
Select how to view your ToDo in the drop-down list.



Settings forecasts

View everybody's sales forecasts
Ticked: Enables the user to see everybody's sales forecasts
Unticked: Closes the feature, View sales forecasts, All. The field is greyed out.

View group sales forecasts
Ticked: Gives the user the right to view other group's sales forecasts list in the Sales forecasts window.
Unticked: Closes the features, Change group and View Group sales forecasts in the Sales forecasts window. The fields are greyed out.

Other

Colour active row
Select desired colour for the active row.

Auto Start program
Click the list arrow and select the desired program to open when the user logs in.
If the "Hide ToDo when logging in" checkbox is unticked, two windows will appear, and ToDo will open in front of the window you have selected to auto-start.

Language: Here, you select the user language.

Own sorting calendar: Here you determine your own sort order of technicians in the service calendar.

E-mail
Enter your e-mail address here if you want your sender address to be displayed on your WinServ e-mails.

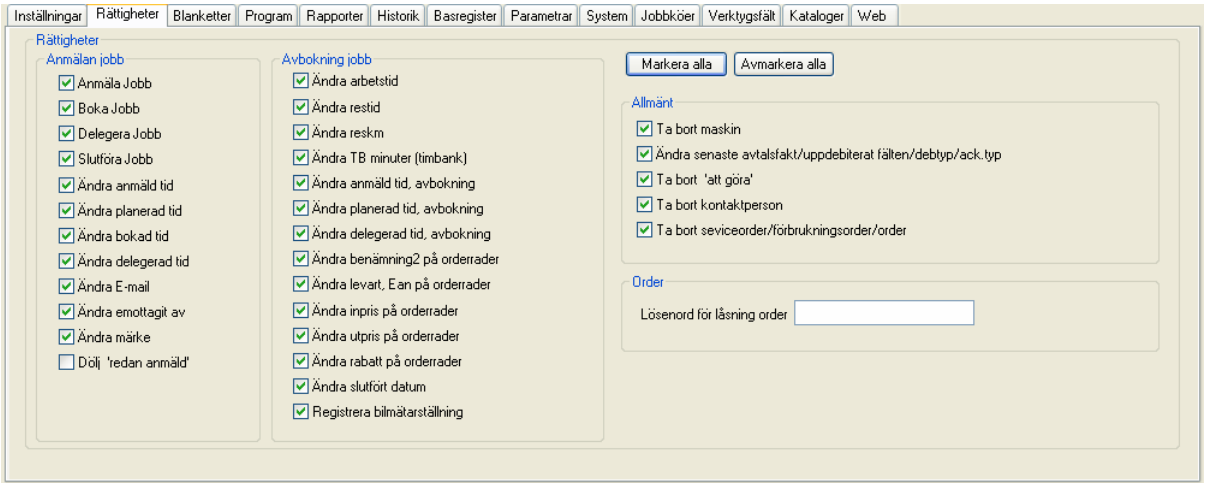
Printer cash receipts: Here, you enter the path to your cash receipt printer.

Rights tab
This tab contains four areas for defining user rights:

- Incoming service call
- Completing service call
- General
- Orders

Select rights

1. Click Markera alla to select all rights, or select the desired right.
2. Click Uppdatera to save.



Picture: Rights

Incoming service call
Settings for the user when he/she registers a new service order. The description below applies from the moment the user clicks the Create order button, until the user clicks Save or Update.

Report service call
Ticked: Gives the right to register service orders.
Unticked: Deactivates the feature.

Book service call
Ticked: Gives the right to book a service call for a technician, which means that the user can change the status for a service order to Booked.
Unticked: Deactivates the feature.

Dispatch service call
Ticked: Gives the right to change the status of a service call to Dispatched.
Unticked: No right to change the status to Dispatched.

Complete service call
Ticked: In connection with a service call completion, the user has the right to change the status to Completed, which, in principle, means the right to create invoice bases.
Unticked: No right to complete service calls.

Change incoming time:
Ticked: The user can change the time the service came in, in the field ”Incoming”.
Unticked: The user cannot change the time in the field ”Incoming”.

Change scheduled time
Ticked: The user can change the times of registered service orders in the field, Scheduled start (the field is soft-coded and can have other names, e.g. Response time, etc.). The text can be changed in System/System parameters/Basic settings/Service order.
Unticked: The user cannot change the times.

Change booked time
Ticked: The user can change the time of booked service calls, in the field Booked technician.
Unticked: The user cannot change the times.

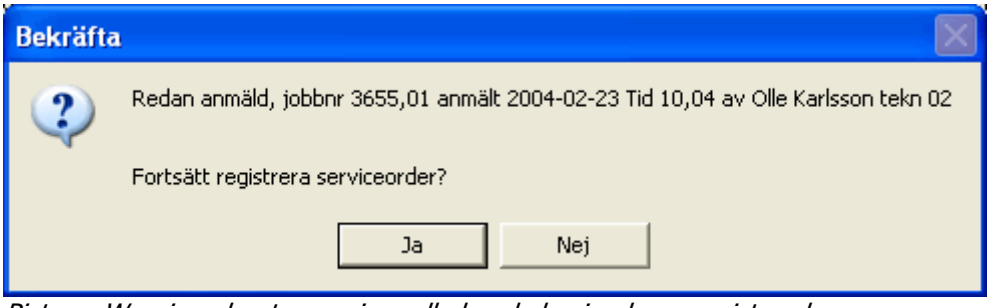
Change dispatched time
Ticked: The user can change dispatched time in the Dispatched field.
Unticked: The user cannot change the time.

Change E-mail
Ticked: The user can change the e-mail address on a service order.
Unticked: The E-mail field is closed and greyed out.

Change Received by
Ticked: The user can change the name of the recipient of an order in the Orderer field.
Unticked: The user cannot change the Orderer field.

Change Order mark
The user can change/add information in the Order mark field.
Order mark can be used as a reference number for invoicing and is often used by the orderer or as a fixed marking for, for example, project invoicing. A fixed order mark must be created on the object card or customer card.
Hide already reported
The feature is used in order for the recipient of an error report to get information about service orders already registered for the object.

Ticked: The dialogue ”Already reported” is not displayed.
Unticked: Recommended if you want the user to receive a warning about a service order already having been registered for the object. Otherwise, there is risk of repeatedly registering the same error report for the object.



Picture: Warning about a service call already having been registered.

Completing service call
Setting for the user when he/she opens and changes an existing service order.

Change work time
Ticked: The user can change/register work time.
Unticked: The field is closed and the user cannot change/register the information.

Change travel time
Ticked: The user can change/register travel time.
Unticked: The field is closed and the user cannot change/register the information.

Change travel distance
Ticked: The user can change/register travel distance.
Unticked: The field is closed and the user cannot change/register the information.
.
Change TB minutes (time bank)
TB is automatically calculated, Start time minus End time = the time in the TB field. That time will be deducted from the time bank balance.
Ticked: The user cannot change the TB field.
Unticked: The field is closed and the user cannot change the information.

Change incoming time, completion
Ticked: The time that can be changed is found on the Service order tab, in the Incoming field.
Unticked: The field is closed and the user cannot change the information.

Changed scheduled time, completion
Ticked: The time that can be changed is found on the Service order tab, Scheduled start.
Unticked: The field is closed and the user cannot change the information.

Changed dispatched time, completion
Ticked: The time that can be changed is found on the Service order tab, Dispatched.
Unticked: The field is closed and the user cannot change the information.

Change Description2 on order rows
Ticked: The user can change the text in the Desc2 field on the Invoice rows tab.
Unticked: The field is closed and the user cannot change the text.

Change del. article, Ean on order rows
Ticked: The user can change the Delivered article on the Invoice rows tab.
Unticked: The field is closed and the user cannot change the information.

Change cost price on order rows
Ticked: The user can change the cost price on the Invoice rows tab.
Unticked: The field is closed and the user cannot change the information.

Change Sales price on order rows
Ticked: The user can change the sales price on the Invoice rows tab.
Unticked: The field is closed and the user cannot change the information.

Change discount on order rows
Ticked: The user can change the % field on the Invoice rows tab. This is ticked if the user has the right to give customers discounts.
Unticked: The field is closed and the user cannot change the information.

Change completed date
Ticked: The user can change/register the time in the End time field on the Time registration tab.
Unticked: The field is closed and the user cannot change the information.

Register odometer
Ticked: The user can enter the odometer reading in the field, Counter from and Counter to, on the Time registration tab.
Unticked: The field is closed and the user cannot change the information.

General
Here, you decide whether a user should have the right to delete:

- Object (soft-coded name; can be changed to Machine, Installation, Project, etc.)
- Todo
- Contact
- Service order, Consumption order/Order

You also decide whether the user should have the right to change information concerning contractual invoicing; changes are made on the object card:

- Change latest contract invoice/up debit fields.

Delete object
Ticked: The user has the right to delete an object (machine) from the directory.
Unticked: The user cannot delete an object (machine).

Change latest contract invoice/up debit fields.
Ticked: The user has the right to change the field of an object card (machine) according to the list below:

Contract/Service tab:

- Service contract/Cost price.
- Service contract/Latest contract invoice
- On-call contract/Cost price.

Contract/Counter tab:

- Counter/Debit type
- Counter/Accumulation type
- Counter/Description
- Counter/Qty per day
- Counter/Cost price apiece
- Counter/Up debited quantity
- Counter/Accumulated quantity
- Counter/Latest invoice date

Unticked: The above fields are closed and the user cannot change/register.

Delete ToDo
Ticked: The user has the right to delete ToDo items from the directory.
Unticked: The user cannot delete ToDo items.

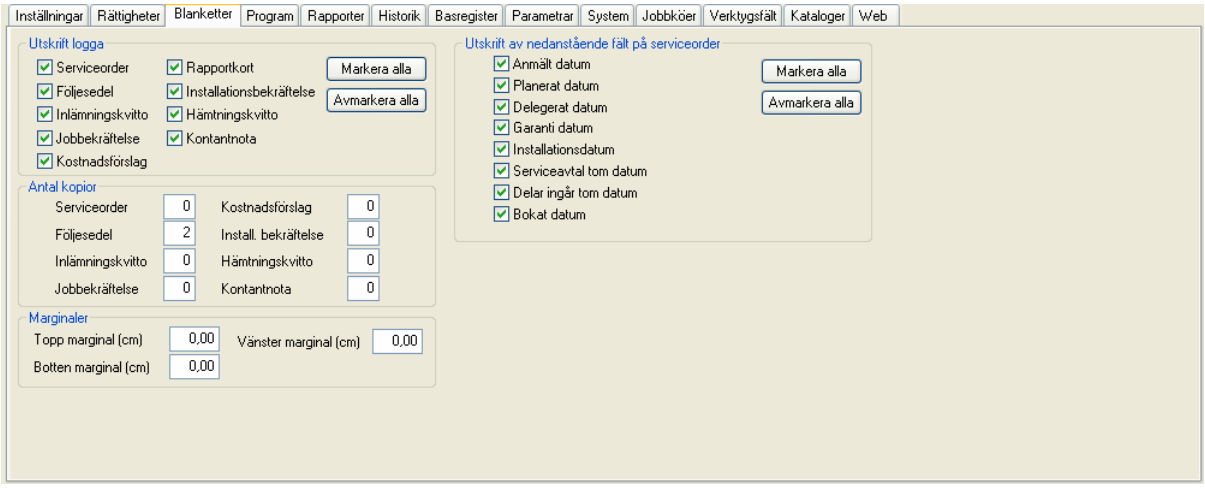
Delete contact
Ticked: The user has the right to delete contacts from the contact directory.
Unticked: The user cannot delete contacts.

Delete service order/consumption order/order
Ticked: The user has the right to delete orders from the order directories.
Unticked: The user does not have the right to delete orders.

Orders
Password for locking order:
Enter the desired password if the user works on password-protected orders.

Forms tab
This tab contains five areas of forms settings and printouts:

- Print logo; select the forms on which to print the company logo.
- No. of copies; select the number of copies to print.
- Margins; set the margins for the forms.
- Do NOT clear the view after printing.
- Printing the fields below on the service order.



Print logo
Tick the checkbox for the desired form on which to print the logo:

- Service order
- Delivery note
- Delivery receipt
- Service call confirmation
- Cost estimate
- Report card
- Installation confirmation
- Collection receipt
- Cash receipt

Note! Click Select all to select all forms.

Number of copies:
Click in the field next to the desired form name and enter a number.

Note! This requires that the field, Selecting printer when printing forms, is unticked. See Settings tab.

Margins
You can set custom margins for forms.
To save margins: Click in the desired field, e.g. Top margin (cm) and enter a new value, e.g. 2. Click Save or Update to store the new values.

Note! This requires that the field, Selecting printer when printing forms, is unticked. See Settings tab.
Do NOT clear the view after printing.
Settings that determine what will be shown on screen after printing a form.
Unticked field means that the view is cleared after printing.

Note! Click Select all to select all Do NOT clear.

Printing the fields below on the service order
Tick the checkbox at the fields that you want to be visible on the service order when printing.

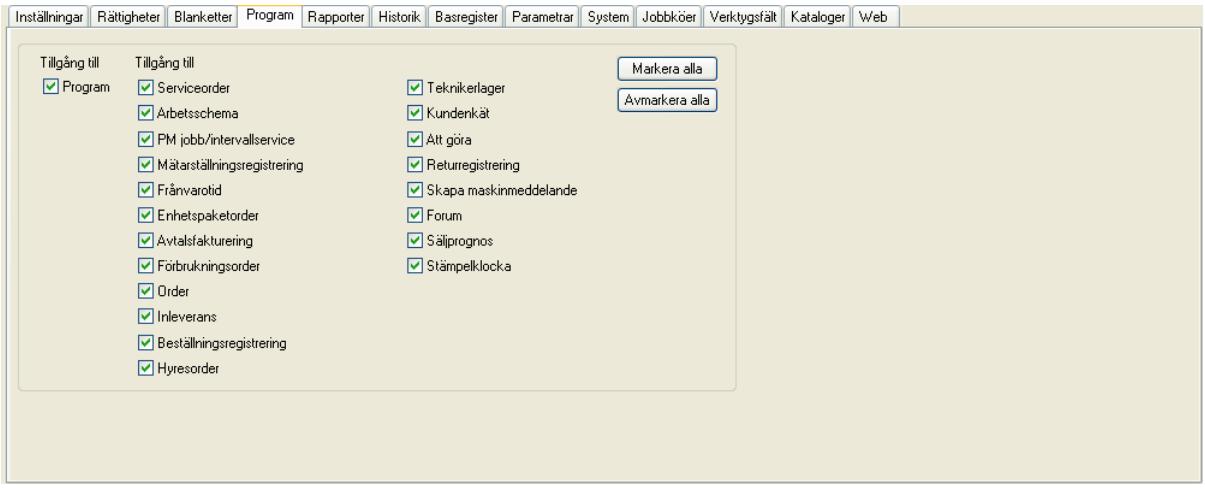
- Incoming date
- Scheduled date
- Dispatched date
- Warranty date
- Installation date
- Service contract to date
- Parts included to date
- Booked date

Note! Click Select all to select all fields.

Program tab
Select the checkbox by the programs you want the user the rights to use:

- Service order
- Work schedule
- PM service call
- Counter registration
- Absence
- Unit package order
- Contractual invoicing
- Consumption order
- Orders
- Indelivery of goods
- Purchase order registration
- Rental order
- Technician stock
- Customer survey
- ToDo
- Return registration
- Create object message
- Discussion group
- Sale forecast
- Time clock

Tick all by clicking Select all.
Untick all by clicking Deselect all.



Picture: This is displayed when the user tries to open a program to which he has no access rights.

Reports tab

Click in the Access to field
Tick the checkboxes next to the reports to which the user is granted access:

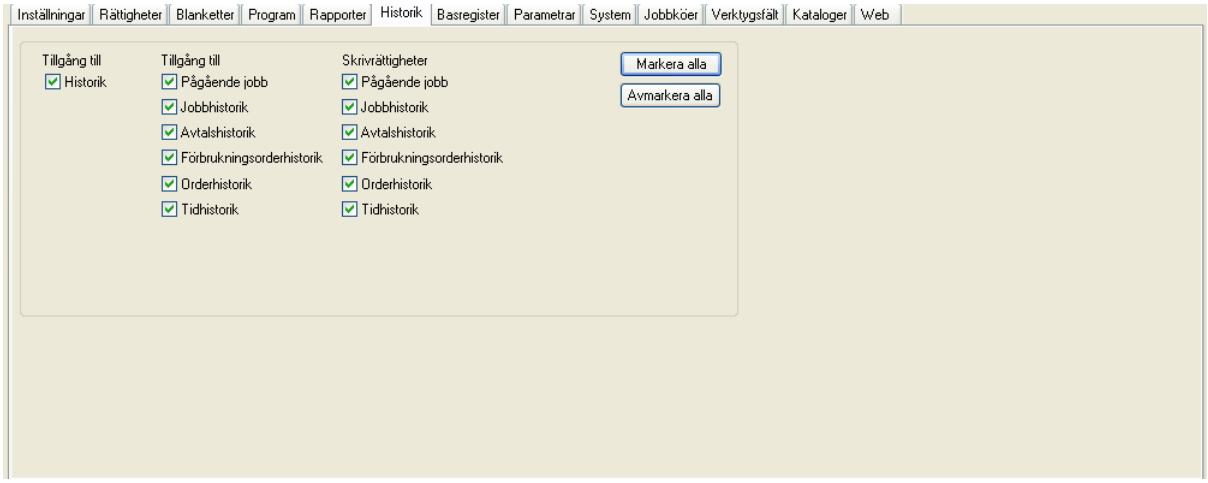
- Lists
- Statistics
- History
- Stock
- Result
- Time registration
- Survey
- Report card
- Service order
- Invoice basis
- Price changes

Click Select all to tick all checkboxes.
Click Deselect all to untick all checkboxes.

History tab
Tick the checkbox next to the history to which the user is granted access and printing rights.

- Ongoing service call
- Service call history
- Contract history
- Consumption order history
- Order history
- Time history

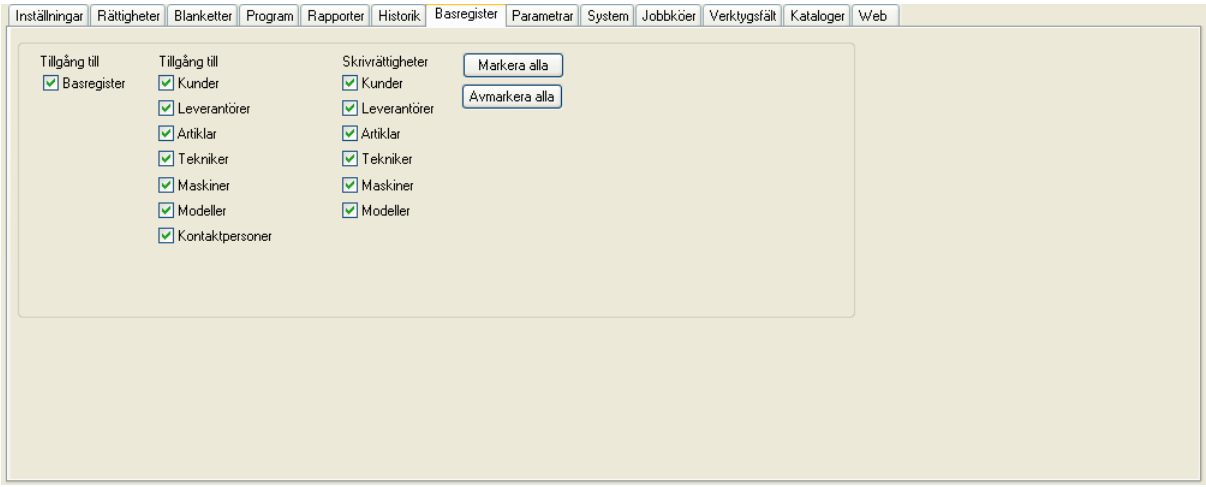
Click Select all to tick all checkboxes.
Click Deselect all to untick all checkboxes.



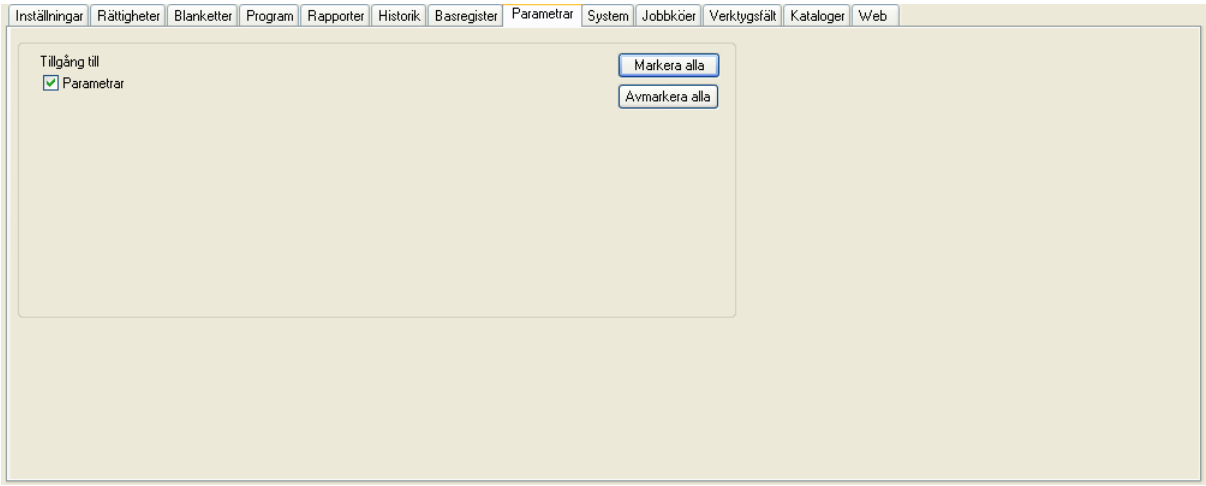
Master data tab
Tick the checkbox next to the directory to which the user is granted access and printing rights.

- Customers
- Suppliers
- Articles
- Technicians
- Objects
- Models
- Contacts

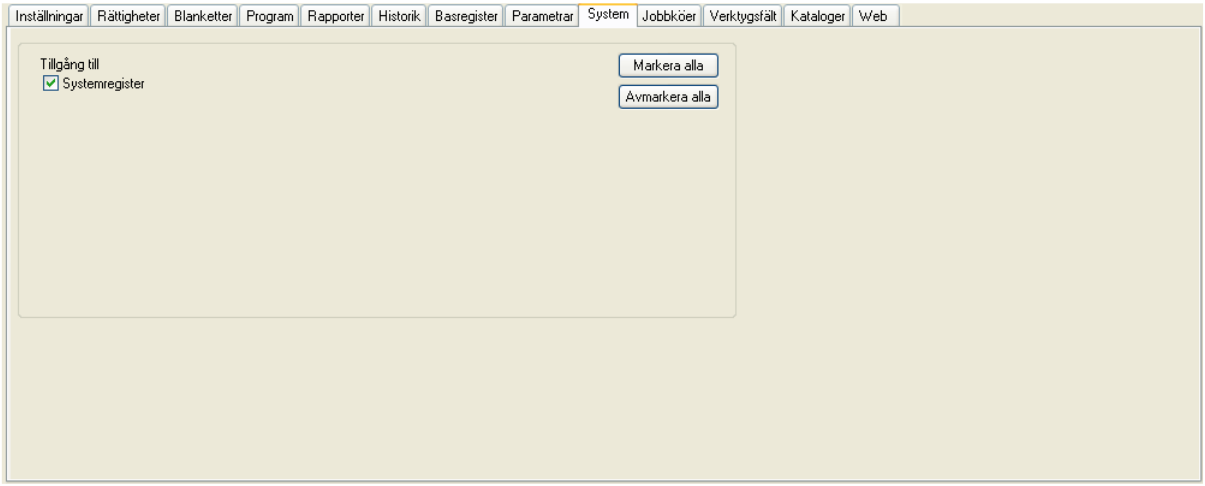
Click Select all to tick all checkboxes.
Click Deselect all to untick all checkboxes.



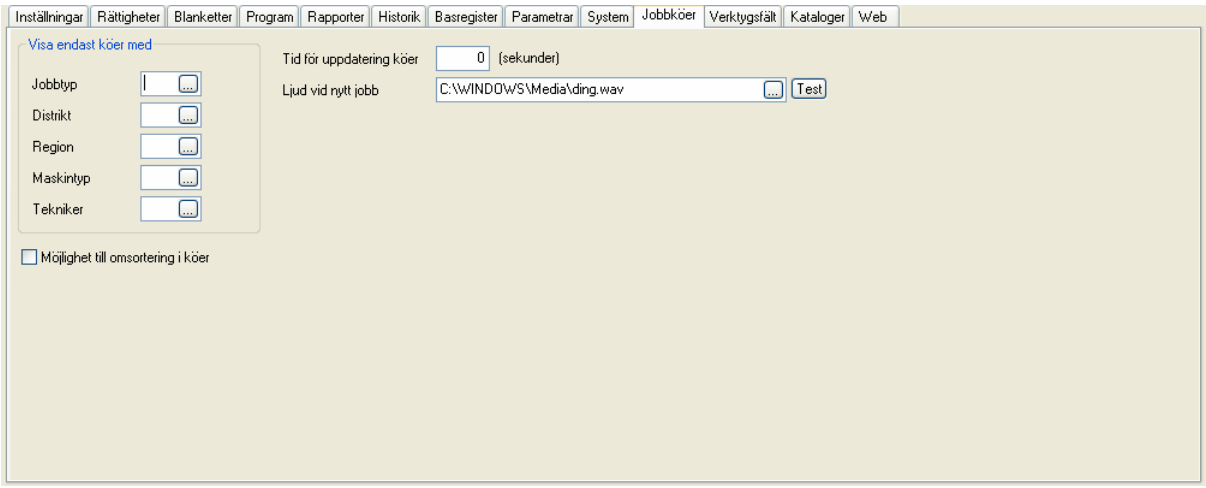
Parameters tab
Tick the checkbox to grant access to Parameters.



System tab
Tick the checkbox to grant access to System directory.



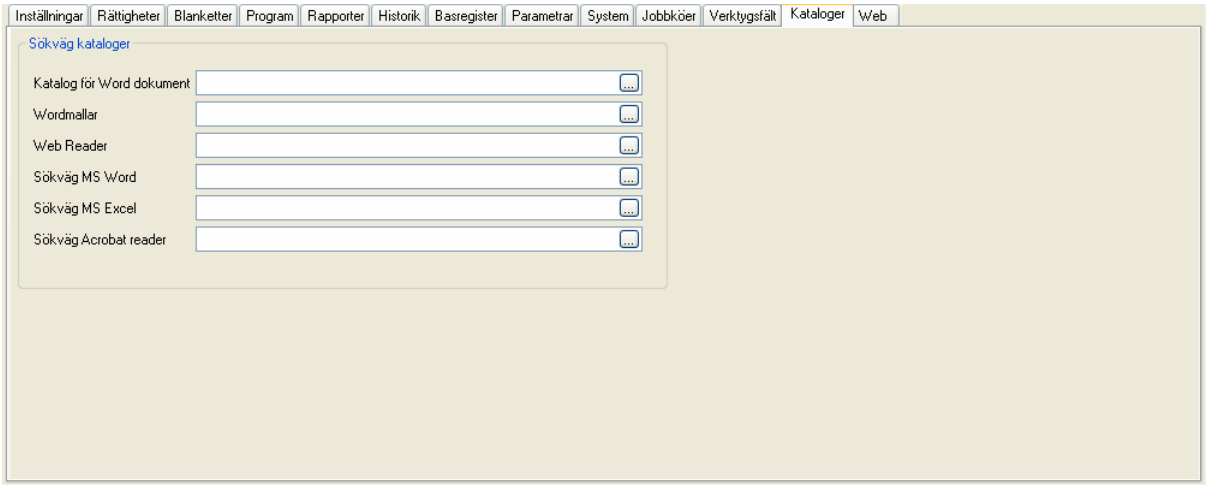
Service call queues tab
Here, you determine how the user's service call queues are displayed.



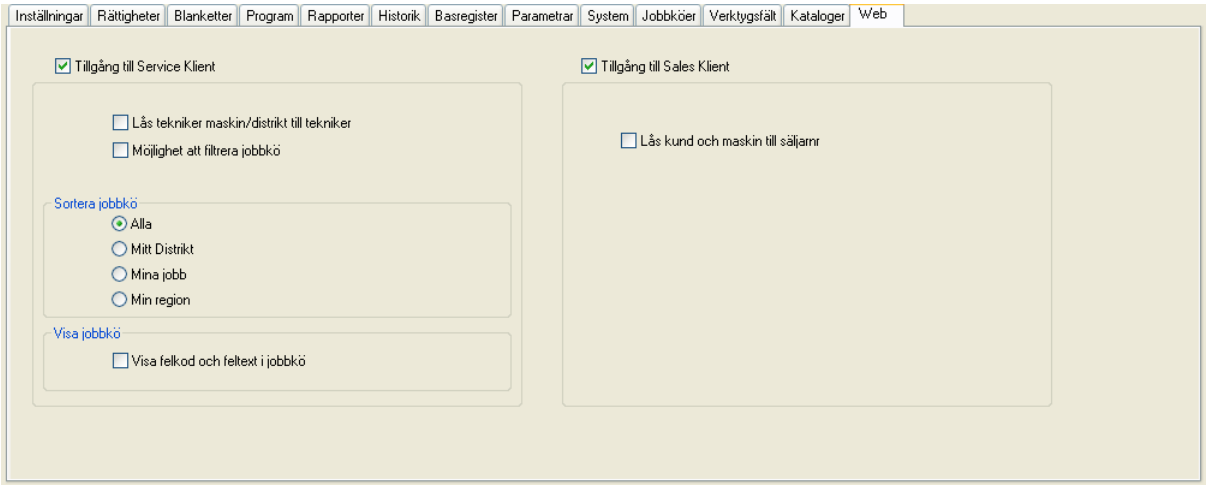
Toolbar tab
Here, you select the buttons to be visible in the toolbar/icon row.

Click Select all to tick all checkboxes.
Click Deselect all to untick all checkboxes.

Folders tab
Here, you enter the local paths to user programs or documents. Those can also be set centrally in System parameters.



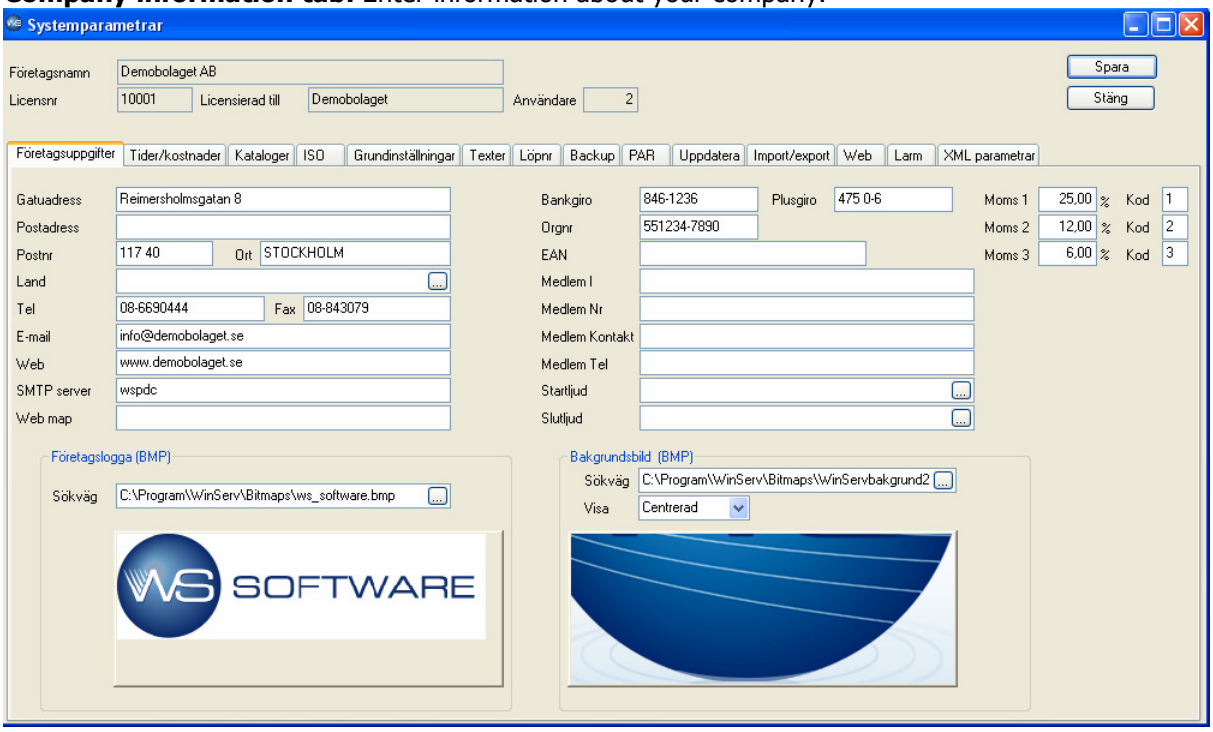
Web tab
Here can set the user web access rights and web interface.



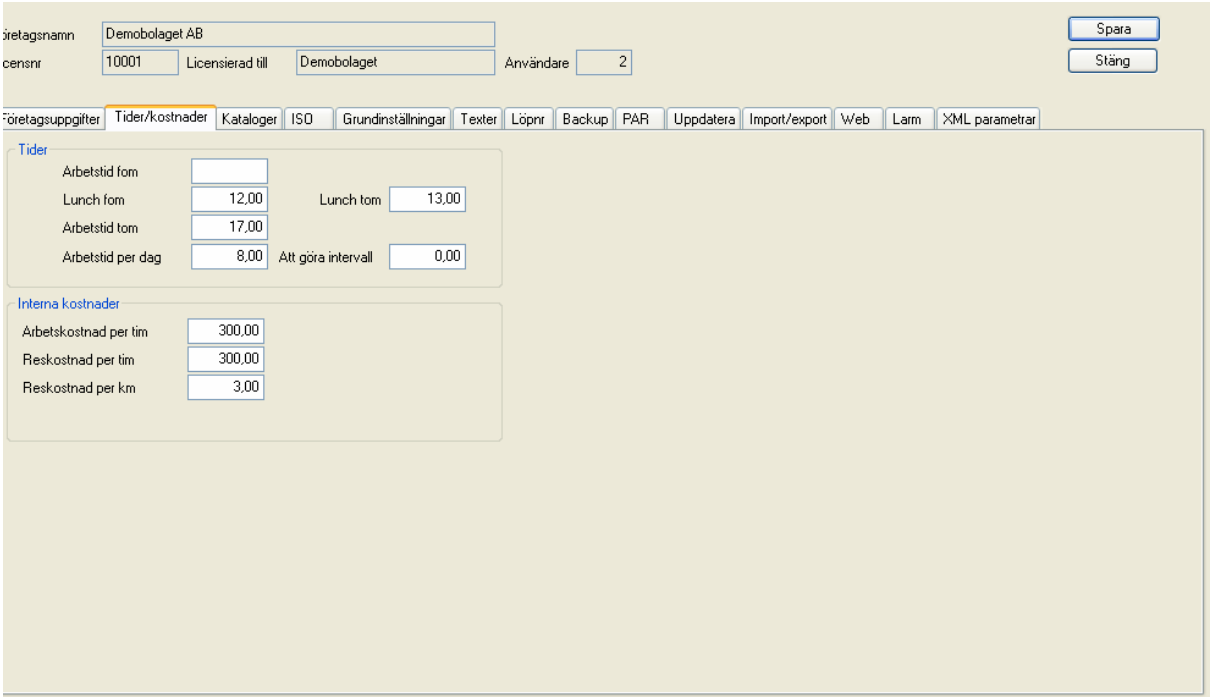
System parameters

In System parameters, you set the parameters for the core configuration of the system and how WinServ should be run in your company. Click System/System parameters in the menu bar.

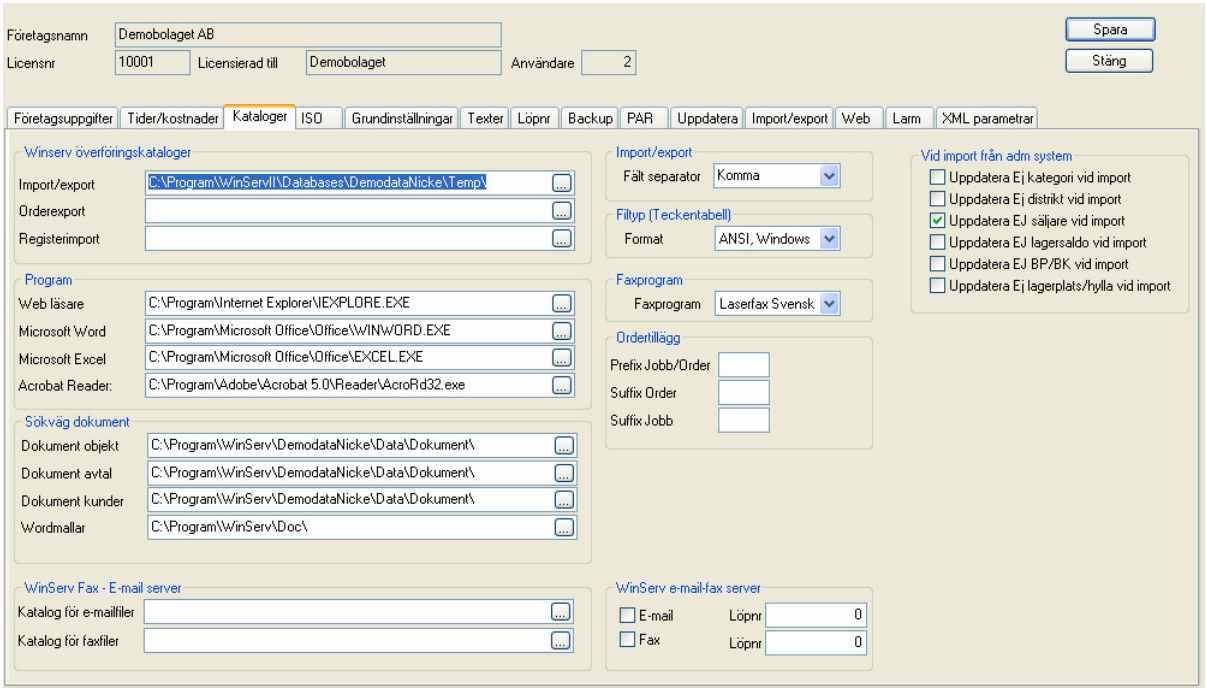
Company information tab: Enter information about your company.



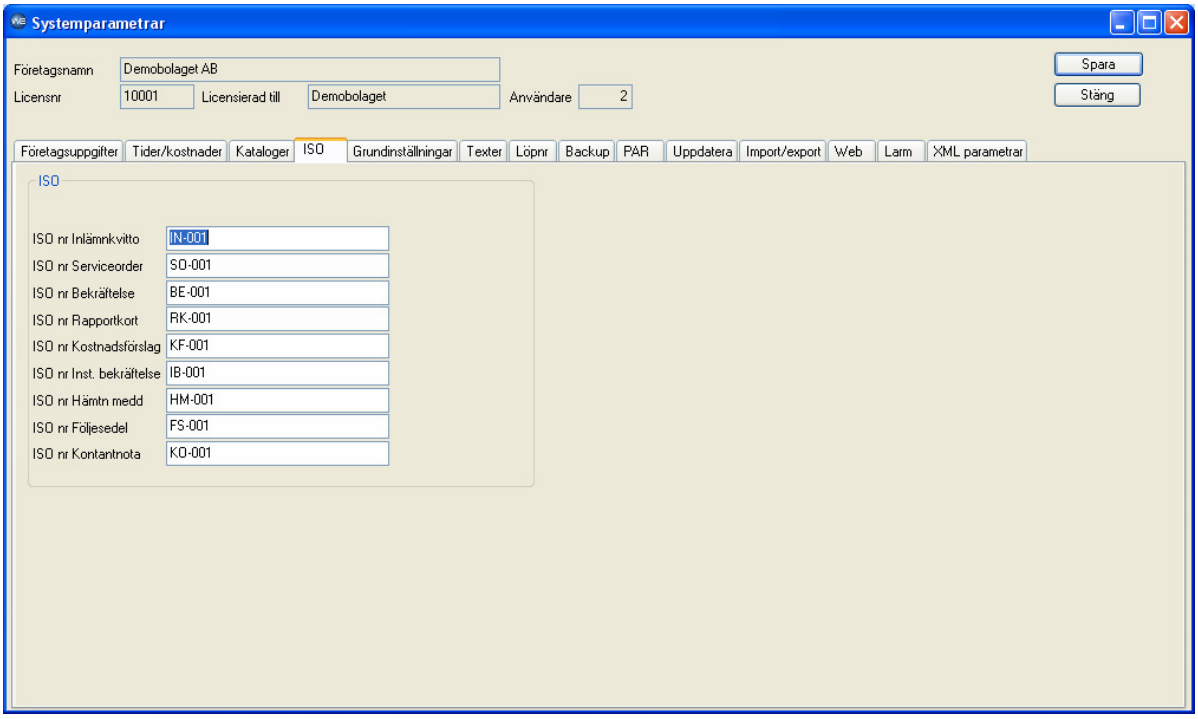
Time/Expenses tab: Here, you enter the company's working hours and the technicians' internal base costs.



Folders tab: Enter the path for WinServ's order files and from which folder on the server directory imports and exports should be done. You also enter the paths for certain external programs that you use in conjunction with WinServ. This tab manages the conditions for all imports/exports in WinServ.

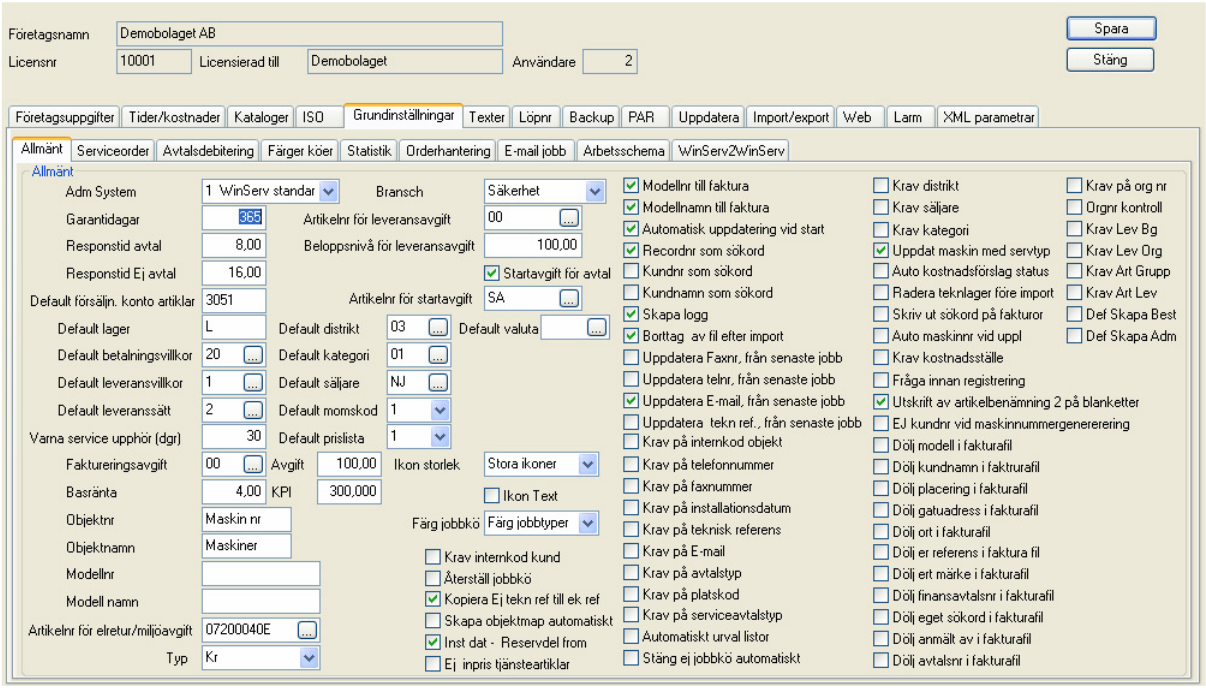


ISO tab: If your company is ISO certified, your forms have ISO numbers; those are entered on this tab.



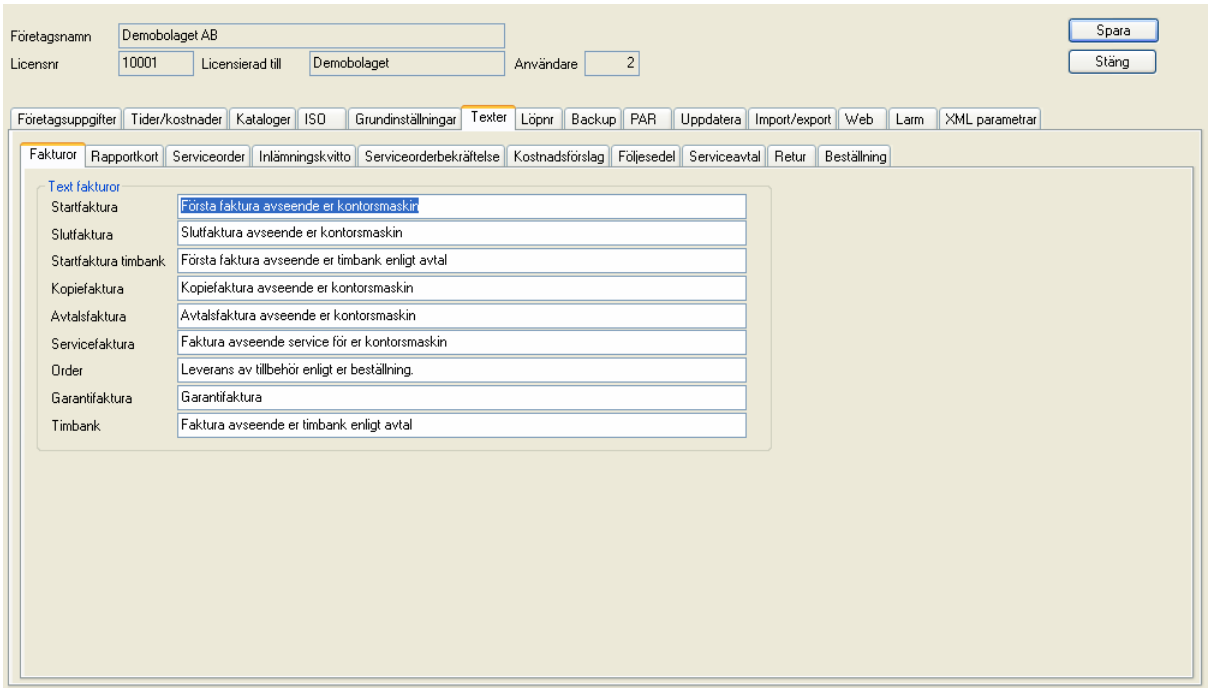
Basic settings tab: On the Basic setting tab, you determine how the system operates. The following features are managed on this tab.

- General
- Service order
- Contractual debiting
- Colour queues
- Statistics
- Order management
- E-mail service call
- Interval/Work schedule

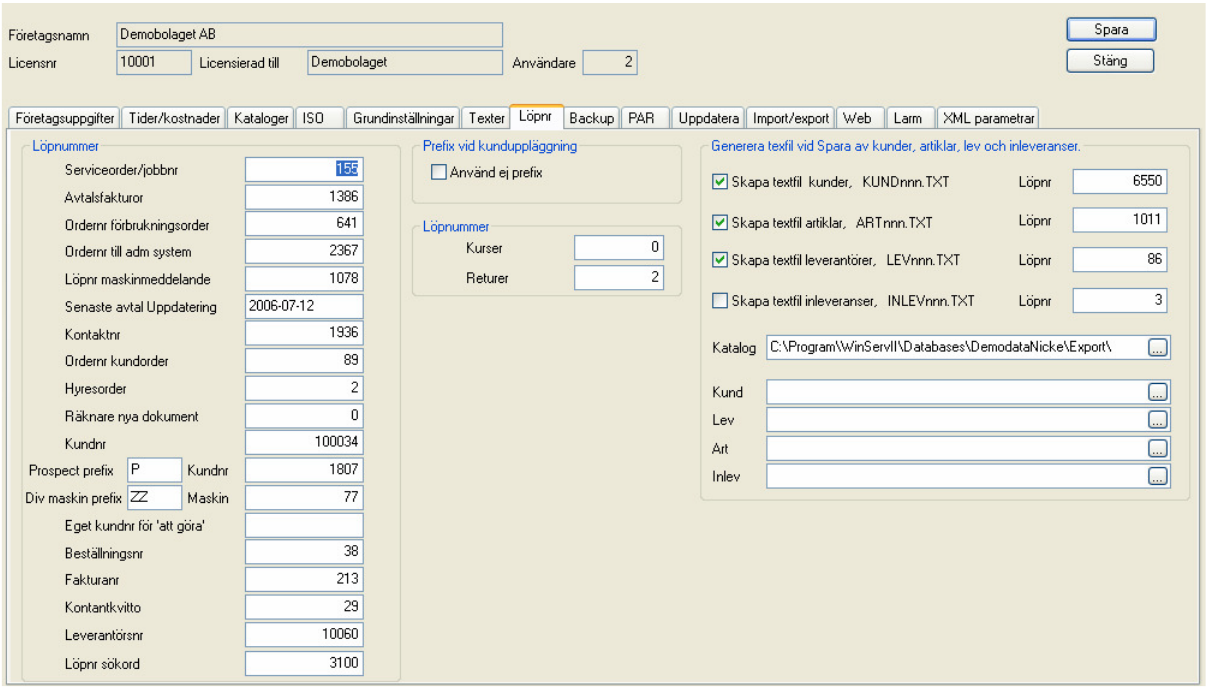


Texts tab: On the Texts tab you change the text of the following printouts.

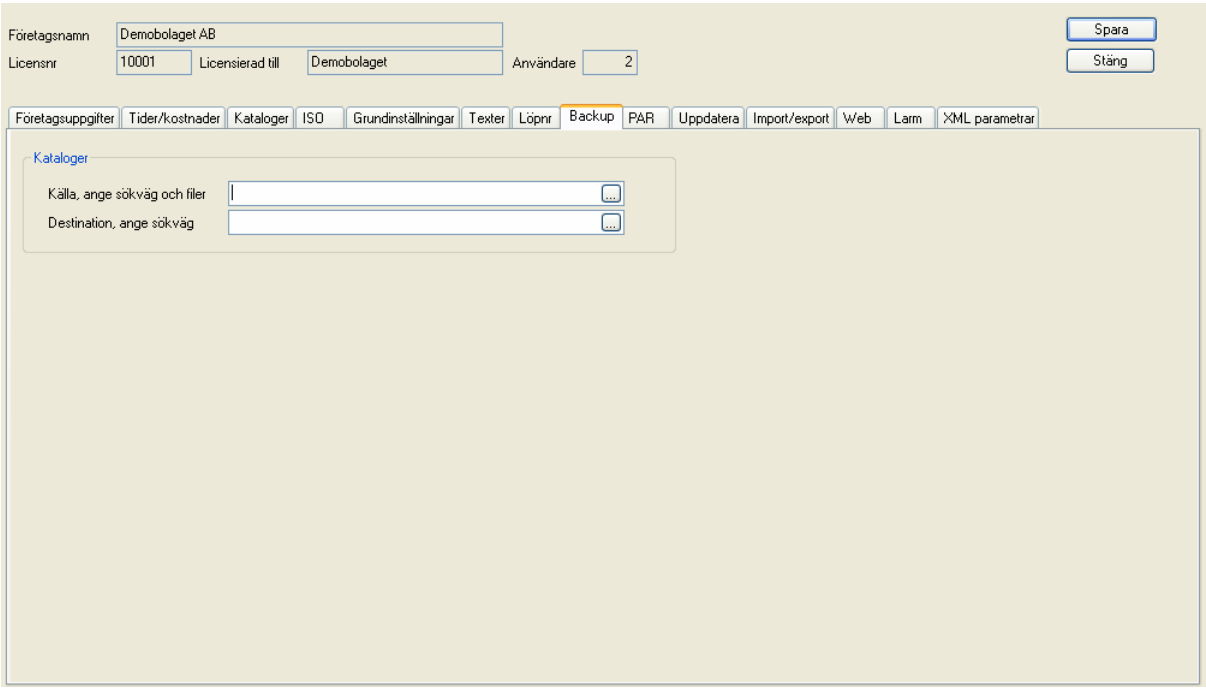
- Invoice
- Report card
- Service order
- Delivery receipt
- Service call confirmation
- Cost estimate
- Delivery note
- Service contract
- Return
- Purchase order



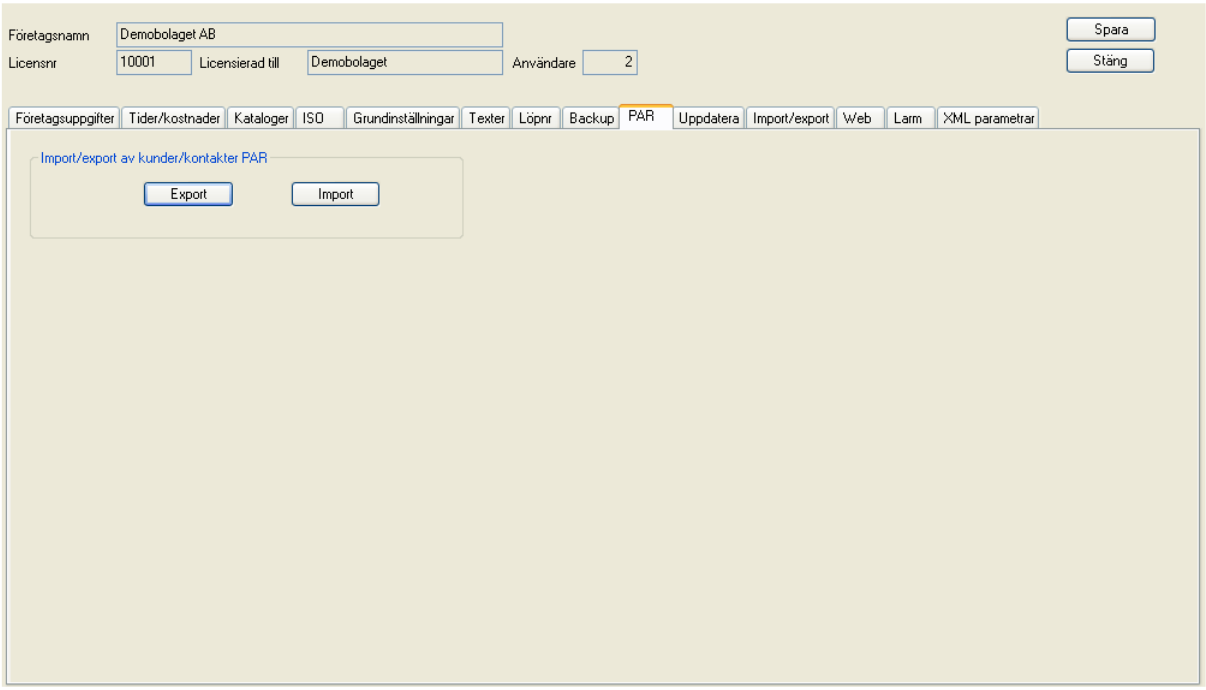
Number series: On the Number series tab you change the number series in order to distinguish them from each other or avoid conflicts with other series. Here, you enter the paths to the folder where changed article, customer and supplier text files, are directed. You can also make changes in connection with changes to the number series.



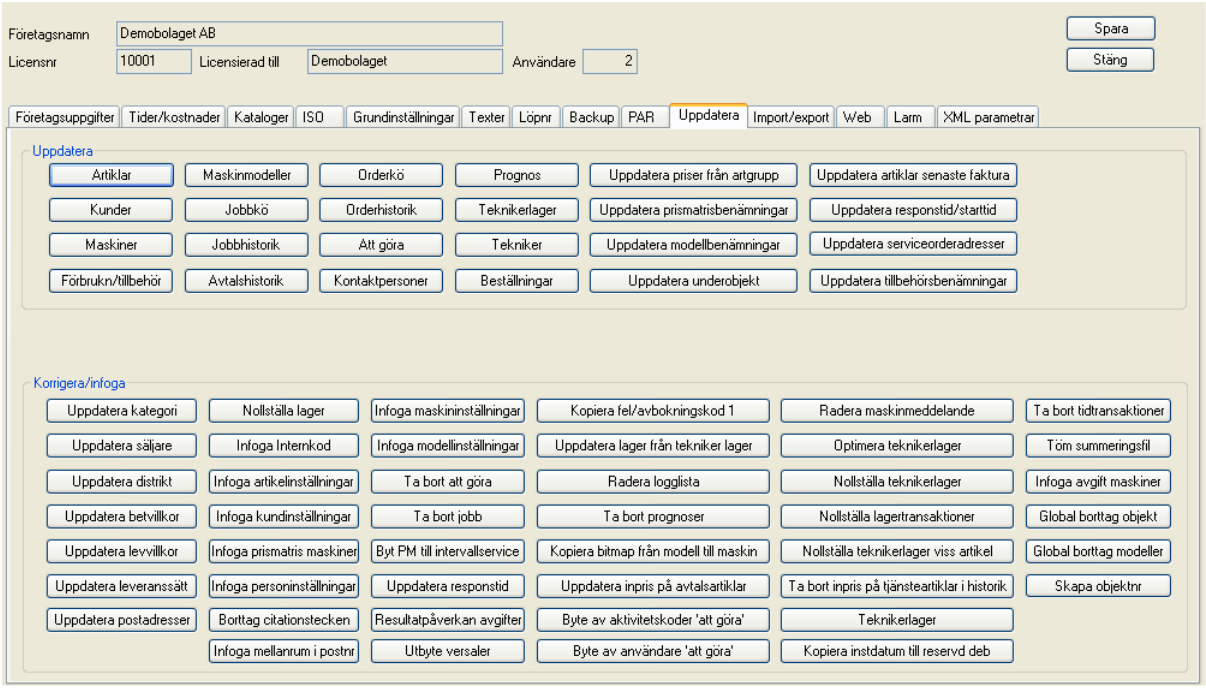
Back-up tab: On the Back-up tab, you enter the paths to source and destination.



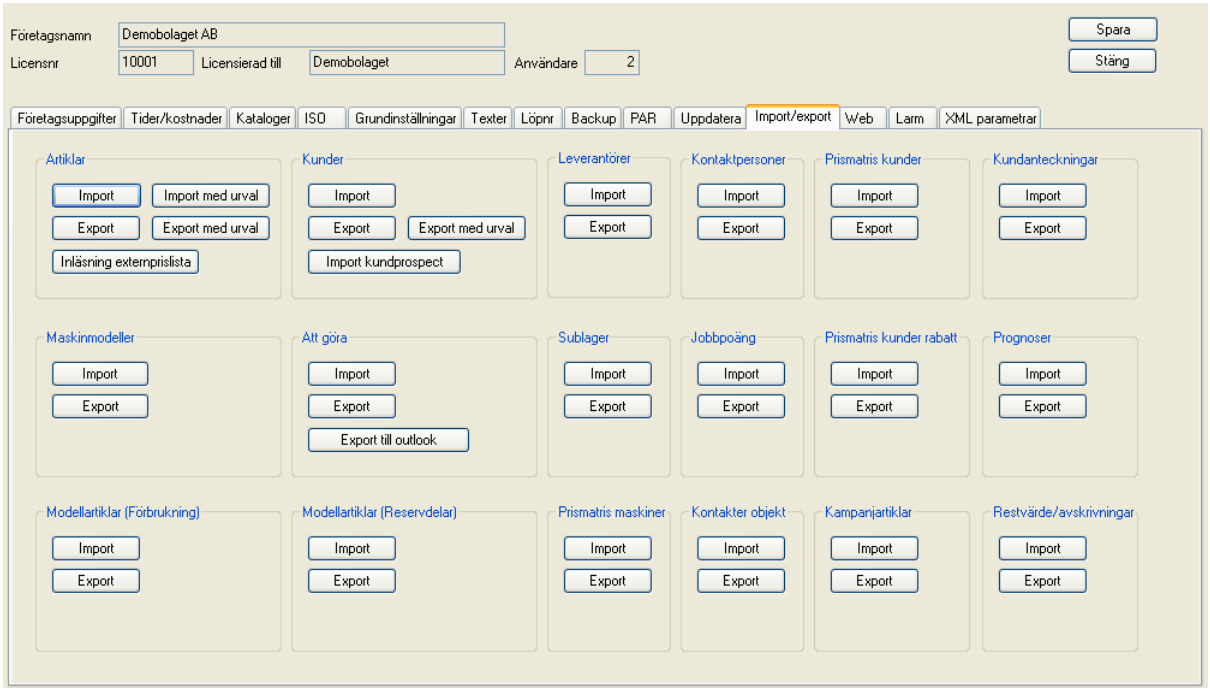
PAR tab: On the PAR tab, you can import or export files if you have purchased customer information from PAR (Postal services Address Register).



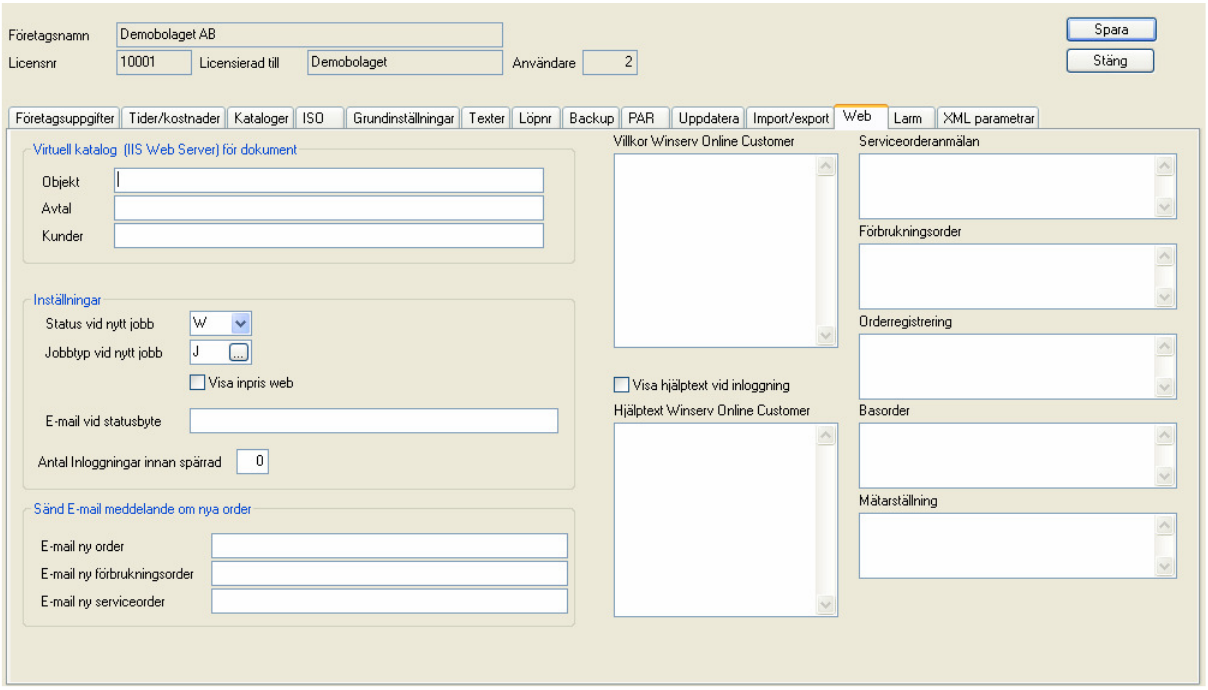
Update tab: On the Update tab you can update different directories. This may be necessary when making changes. There are also global tools for making changes, where you can change a parameter on, for example, an object card or customer card. Those tools are for maintenance and administration of the directories.



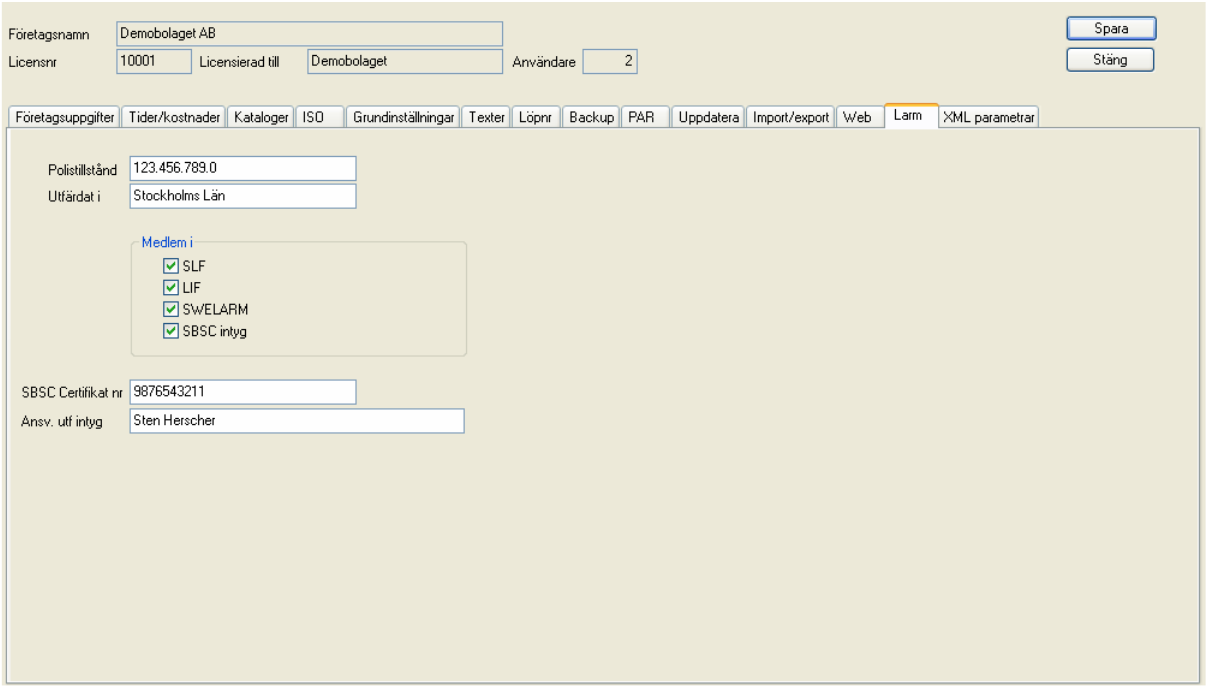
Import/export tab: Here, you import or export files in or out of the various directories, e.g. Articles, Customer, Machine models. You determine in which folder to place files for import and export by entering a path on the Folders tab.



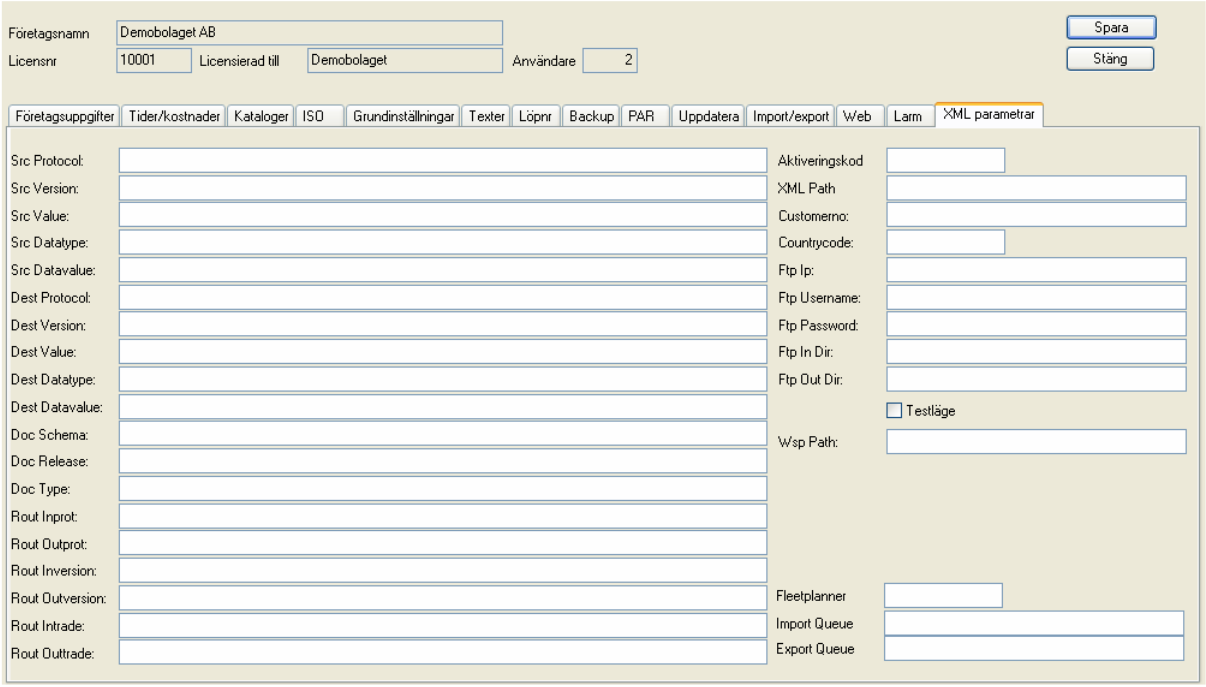
Web tab: Here, you configure the basic settings for the Online services: Service, Sales and Customer.



Alarm tab: Here, companies in the security industry set the basic settings for alarms.

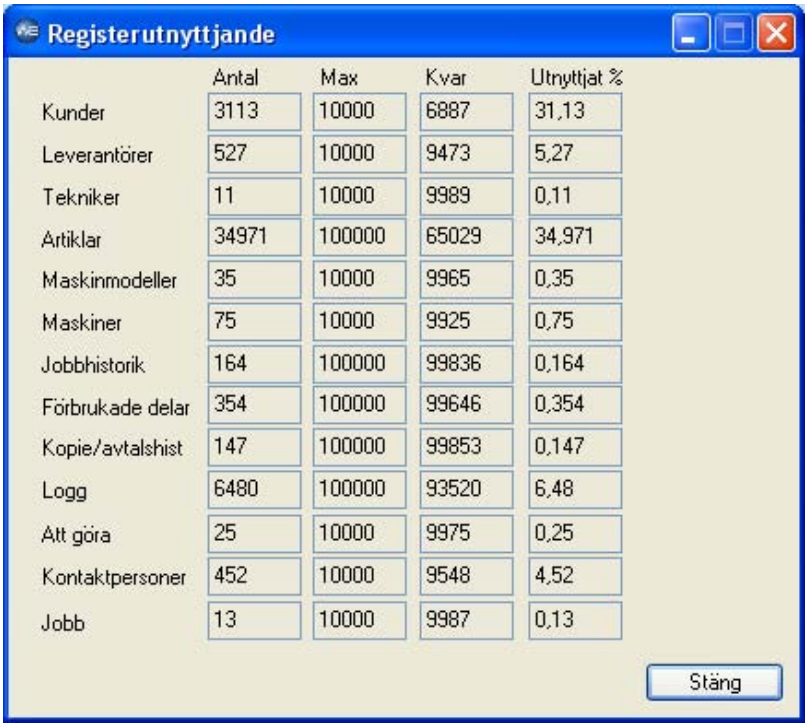


XML parameters tab: Here, you set the parameters for the import/export of XML files. XML is a format that is independent of hardware and software, independent of language, and even independent of the information itself. It is a format for all kinds of industry specific data, web sites, quick transactions, transfer protocols, images and long text files. This format makes it possible for WinServ to communicate with other programs.



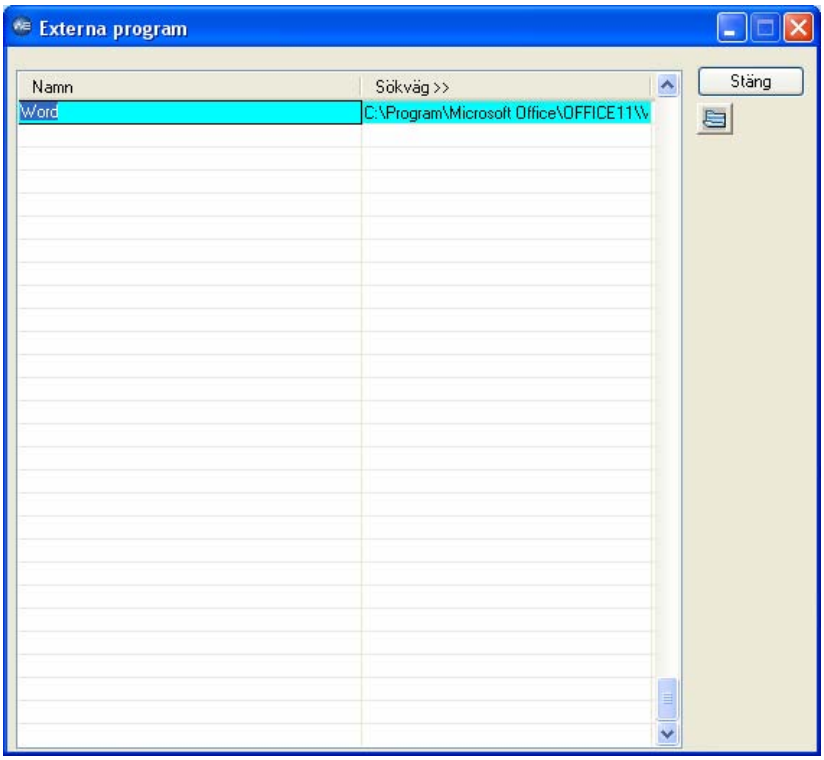
Directory usage

Under Directory usage you can view the number of Customers, Articles, Objects and much more, that you have and can have in the directory. This is to keep track of, for example, the number of articles in order to ensure that they are not too numerous, as that would slow down the system, or even cause it to crash.



External programs

Here, you enter/retrieve paths to external programs to which you want to add short-cuts under the menu bar, Program/External programs.



Chapter 8.

Help

Contents: WinServ helpdesk

Help

Click **Help** in the menu bar and select **WinServ helpdesk**. Here, you find information about which company uses WinServ and to whom it is licensed. You see the license number and the version you are using. There are also short-cuts to our web site and e-mail addresses.
In addition, there is online help available by clicking **Helpdesk**.

Chapter 9.

Windows

Contents: View

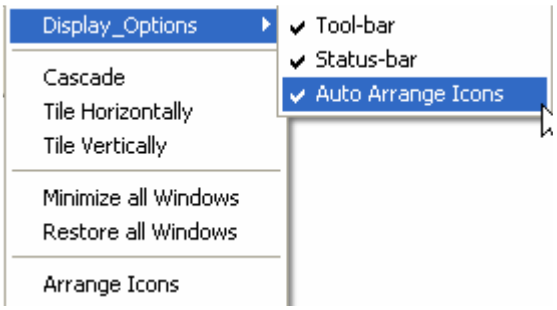
- Tool bar
- Status bar
- Arrange icons

  Side by side
  Overlapping horizontally
  Overlapping vertically
  Minimize all windows/views
  Restore all open windows/views
  Arrange icons at the bottom

Windows

The WinServ menu bar contains a tab called **Windows**. Here, you determine how the windows you opened should be viewed according to the Windows standard.

You can choose to view them **side by side**, **or overlapping horizontally or vertically**. You can also choose to view **tool bar**, **status bar** and whether to **arrange icons** or not.
You can **minimize all windows** and **restore all open windows**.



Chapter 10.

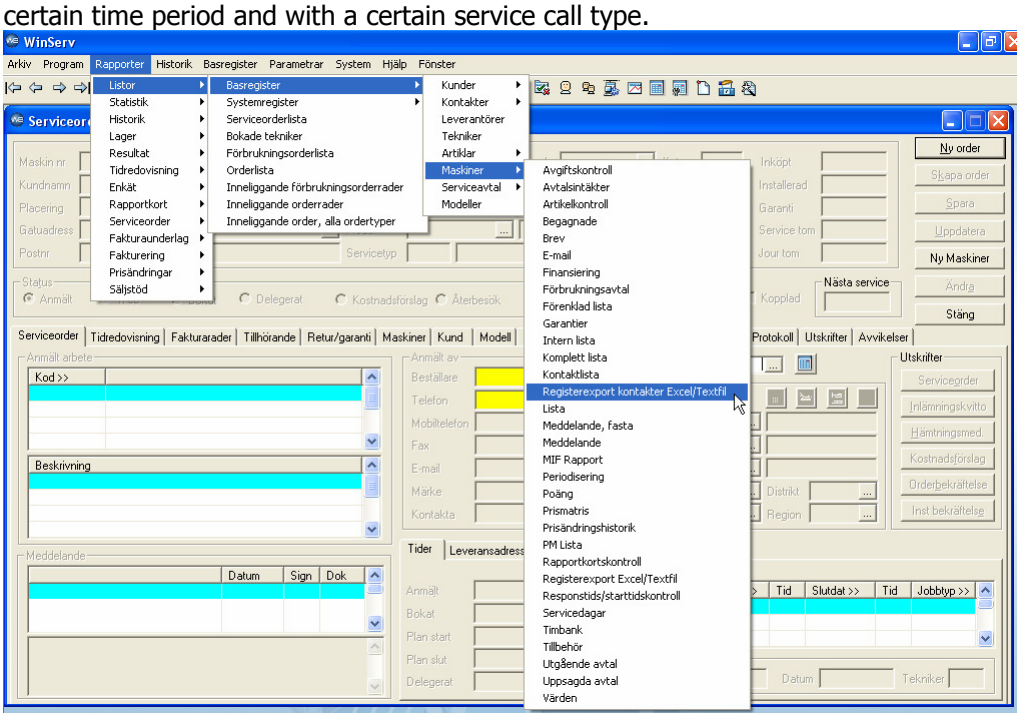
Other

Contents: Link document
Group contract
Keys
Legends

Stockholm, September 2, 2006

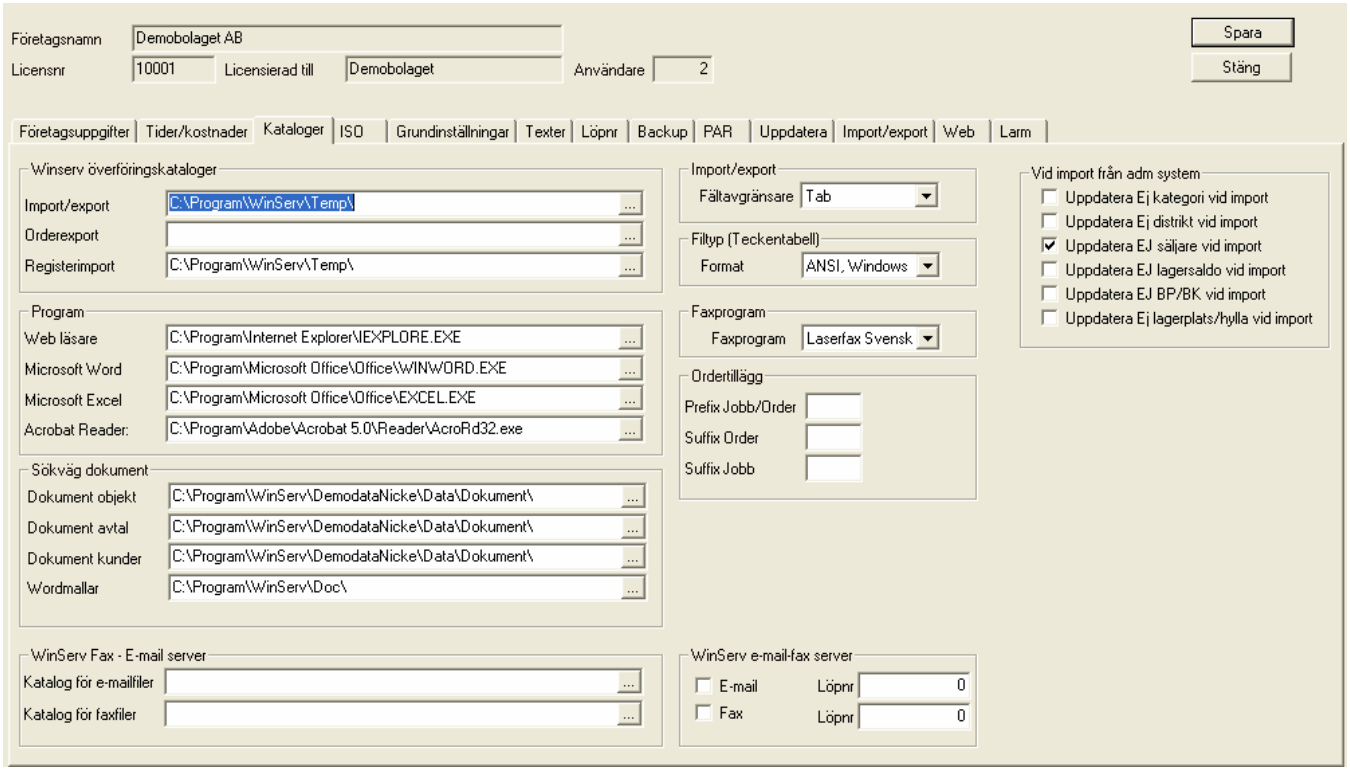
Link document (Office 2003)
Link document is a feature in MS Word that enables you to link, for example, address information in order to send dispatches to your customers. You can export Contacts object from WinServ, which means that you can get the addresses of contacts for the object. Those can, in turn, be linked to MS making impossible to print those addresses on, for example, labels. Do the following.

1. Select the directory export from which to export addresses. It could be, for example, Directory export customers, Contacts or, as in this case, Directory export contacts for the object. The directory export can also be made through a survey where you can export service orders completed within a certain time period and with a certain service call type.

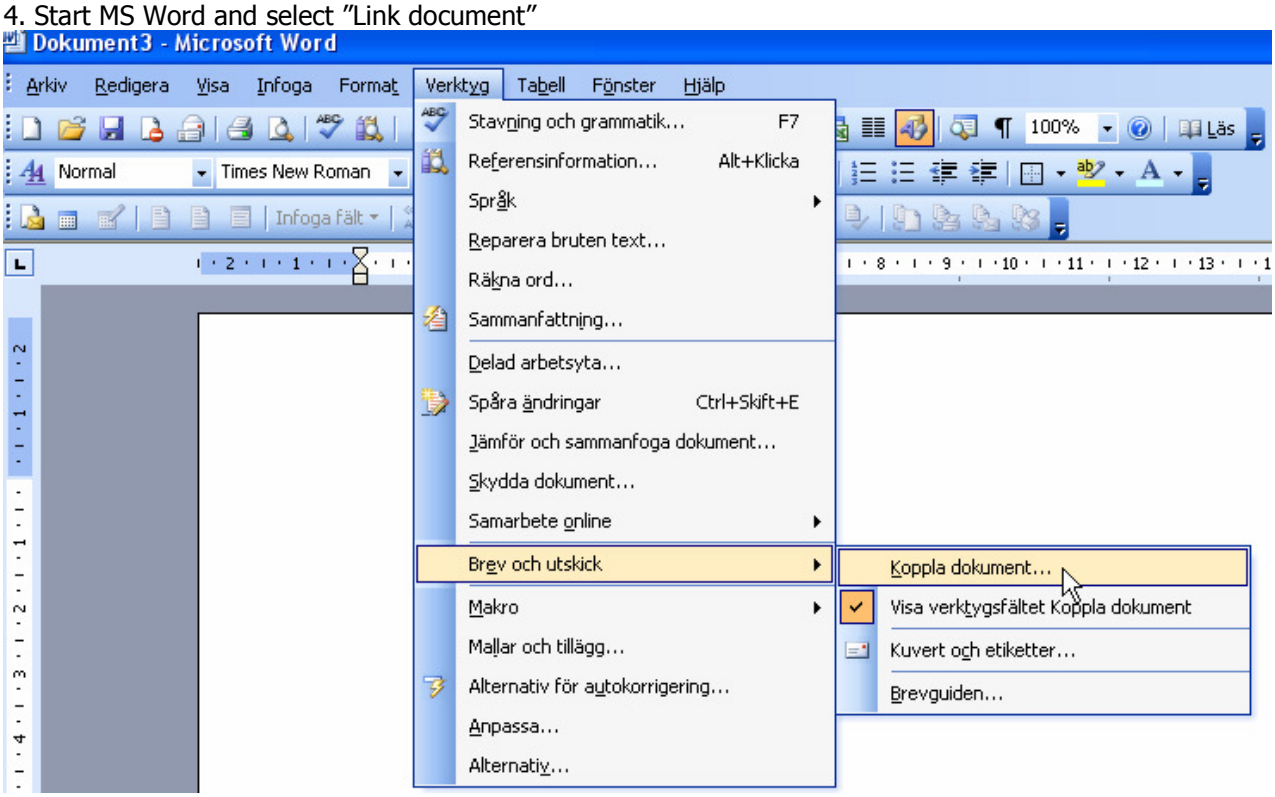


2. Select the information to export by ticking the checkboxes. Select the objects to export. If you do not tick any box, all your registered objects will be exported. Click OK. You have completed the export of a .txt file to a pre-selected folder in WinServ (see point 3).

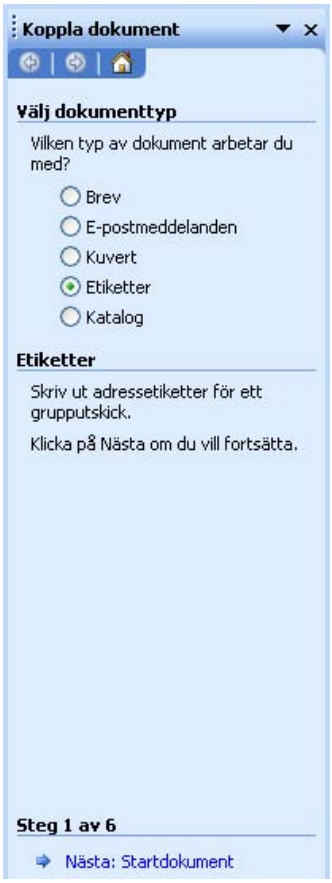
3. On the Folders import/export tab you have entered a path to which the files are exported. Some business systems may also require serial numbers for those files, and a path must be entered on the Serial no. tab.



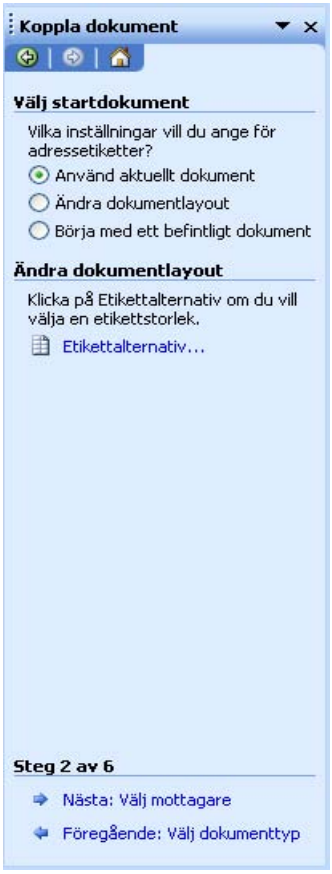
4. Start MS Word and select ”Link document”



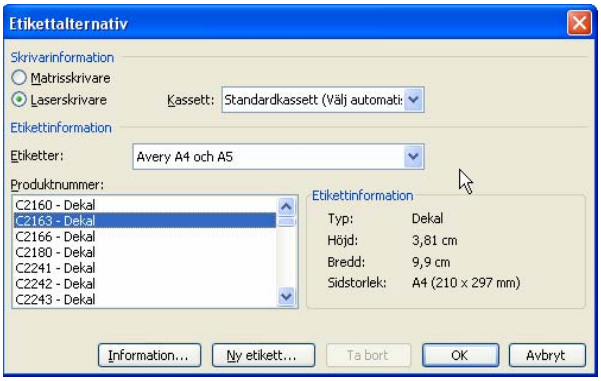
5. Select the document type to use. Select labels and click
Next: Starting document



6. Select label alternative

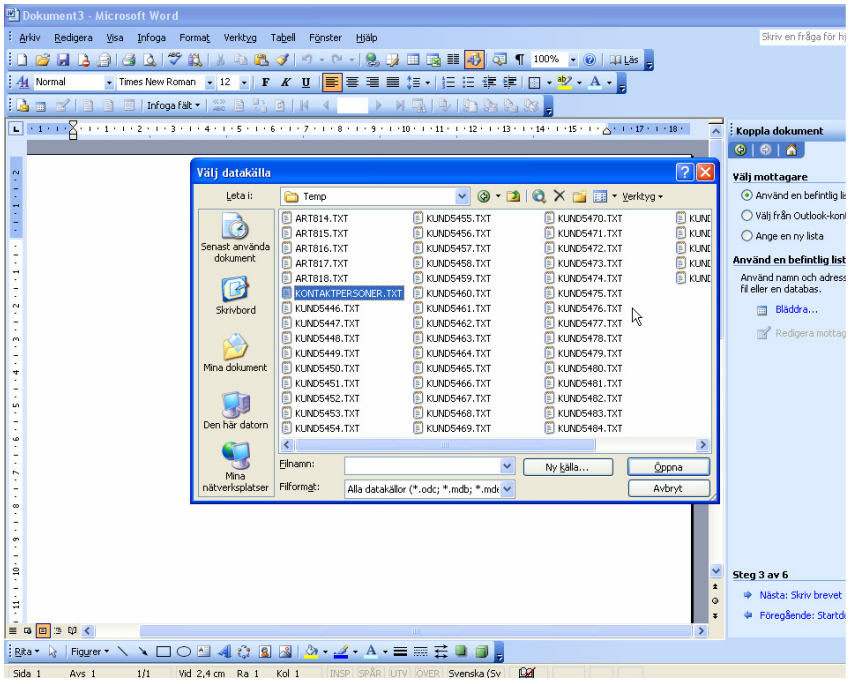


7. Select your label (see box) and click OK. Then click Next: Select recipient.



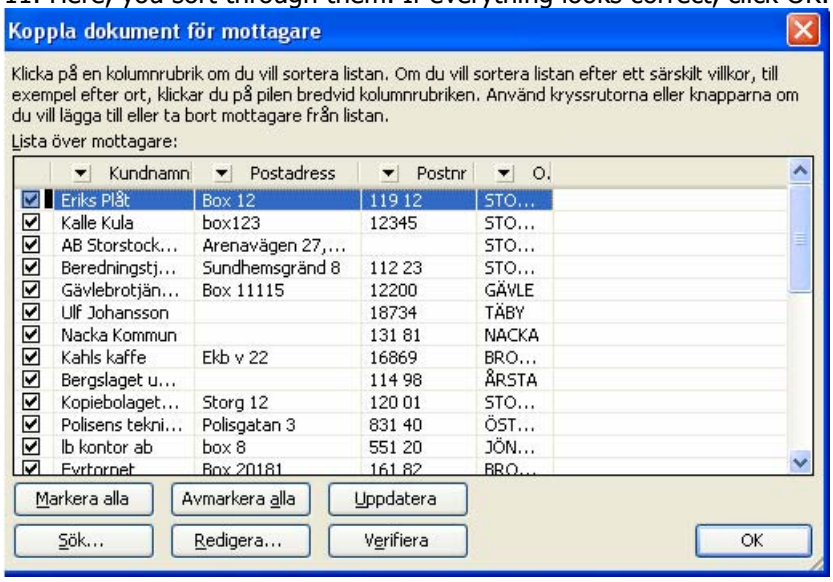
8. Select your created directory export in the form of a .txt file. Click Browse to open your export.

9. Select, for example, Contacts.txt and click Open.



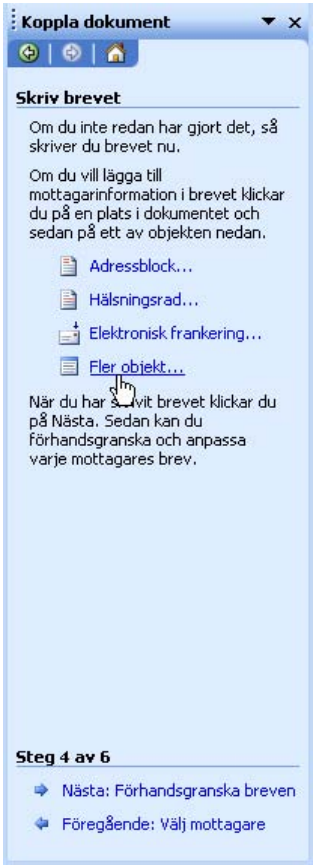
10. Click OK.

11. Here, you sort through them. If everything looks correct, click OK.



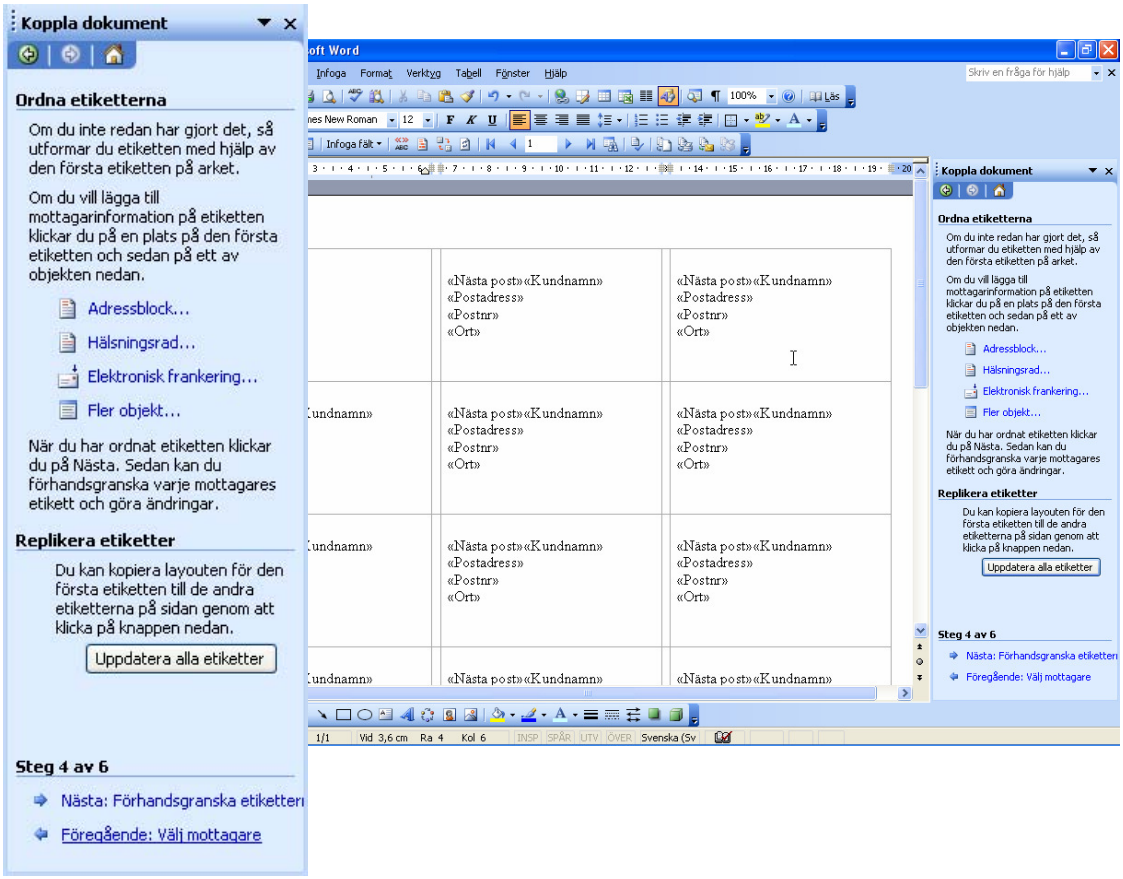
12. Select Next: Arrange labels

13. Select More objects.

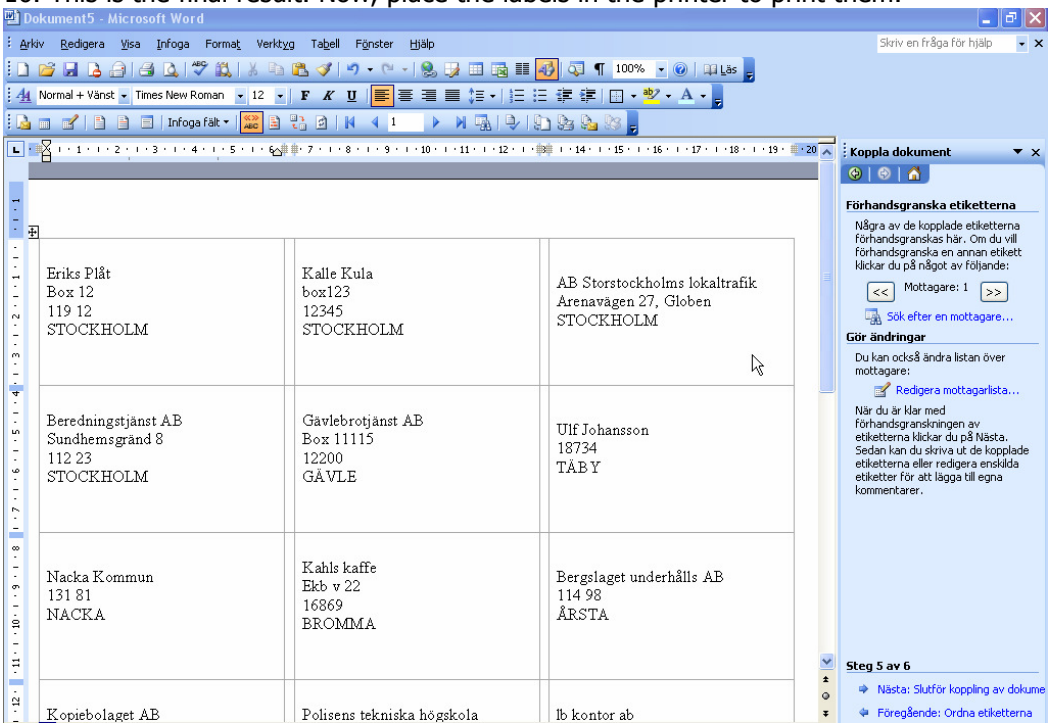

Koppla dokument
Skriv brevet
Om du inte redan har gjort det, så skriver du brevet nu.
Om du vill lägga till mottagarinformation i brevet klickar du på en plats i dokumentet och sedan på ett av objekten nedan.
Adressblock...
Hälsningsrad...
Elektronisk frankering...
Fler objekt...
När du har skrivit brevet klickar du på Nästa. Sedan kan du förhandsgranska och anpassa varje mottagares brev.
Steg 4 av 6
Nästa: Förhandsgranska breven
Föregående: Välj mottagare

14. Insert database fields. Ensure that they are in the desired order for the first label.

15. Then click Update all labels. The view should appear as below. Then click Next: Preview label.

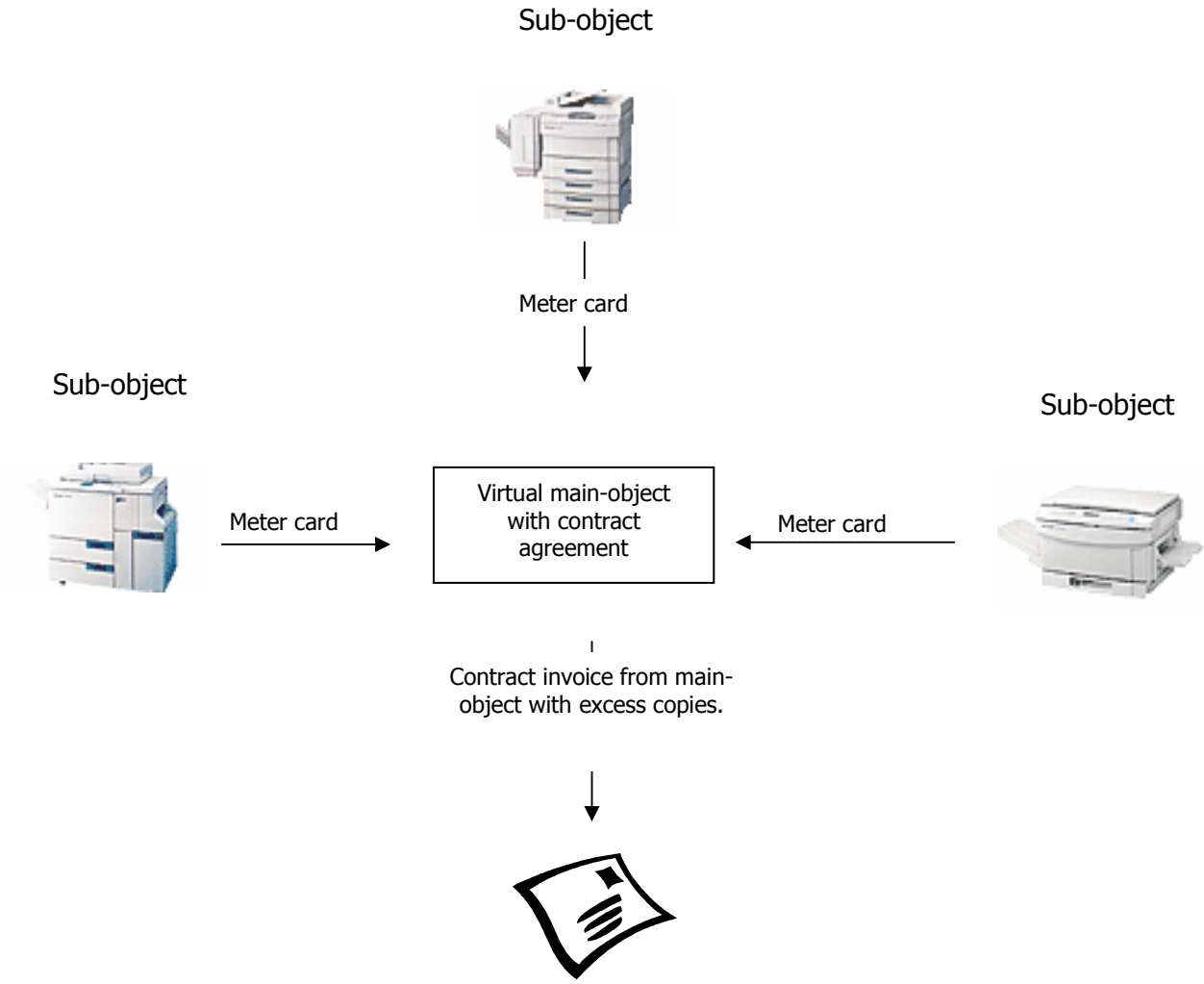

Koppla dokument
Ordna etiketterna
Om du inte redan har gjort det, så utformar du etiketten med hjälp av den första etiketten på arket.
Om du vill lägga till mottagarinformation på etiketten klickar du på en plats på den första etiketten och sedan på ett av objekten nedan.
Adressblock...
Hälsningsrad...
Elektronisk frankering...
Fler objekt...
När du har ordnat etiketten klickar du på Nästa. Sedan kan du förhandsgranska varje mottagares etikett och göra ändringar.
Replikera etiketter
Du kan kopiera layouten för den första etiketten till de andra etiketterna på sidan genom att klicka på knappen nedan.
Uppdatera alla etiketter
Steg 4 av 6
Nästa: Förhandsgranska etiketten
Föregående: Välj mottagare
«Nästa post»«Kundnamn»
«Postadress»
«Postnr»
«Ort»

16. This is the final result. Now, place the labels in the printer to print them.



Group contract

What is main object and sub-object,
and how do you set up such a contract?



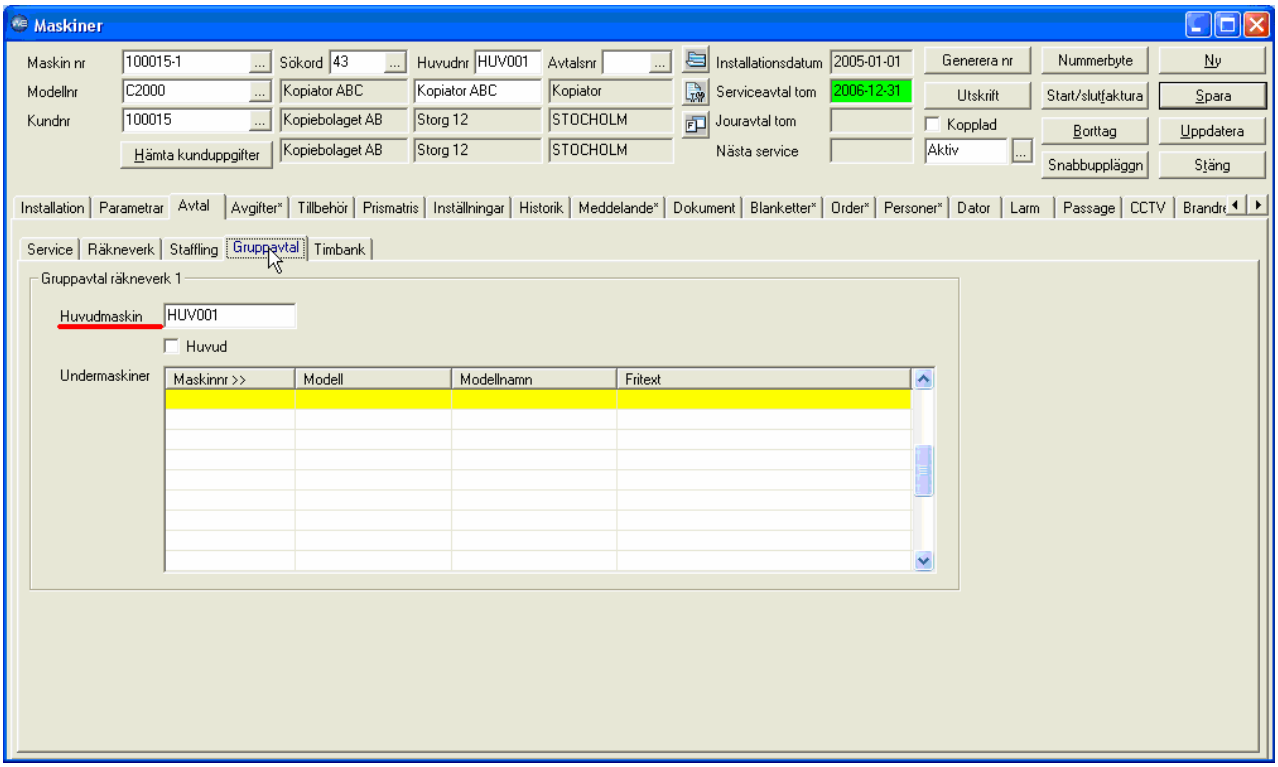
Group contracts are used when the customer has a service contract for several objects at a shared cost, as well as possibly shared included quantity, where the customer himself allocates the included copies between the copiers.

Every machine has its own meter card. When the copies are registered in WinServ, they accumulate to the main machine.

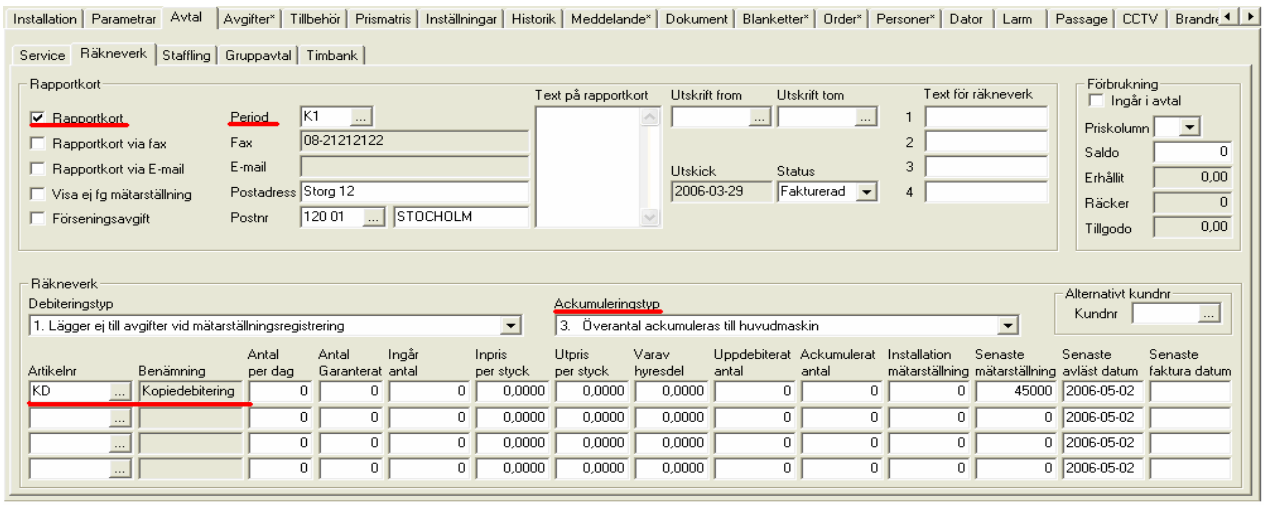
The virtual machine contains information about the shared service cost that is contractually invoiced in WinServ. The price of any excess copies (in arrears) is also defined for the main machine, and those are invoiced together with the service cost (in advance) in the contract invoice.

The contract invoice is created when all meter cards belonging to the group contract, are registered. This means that you have a correct copy history per machine as well as for the entire group contract.

Setup sub-object

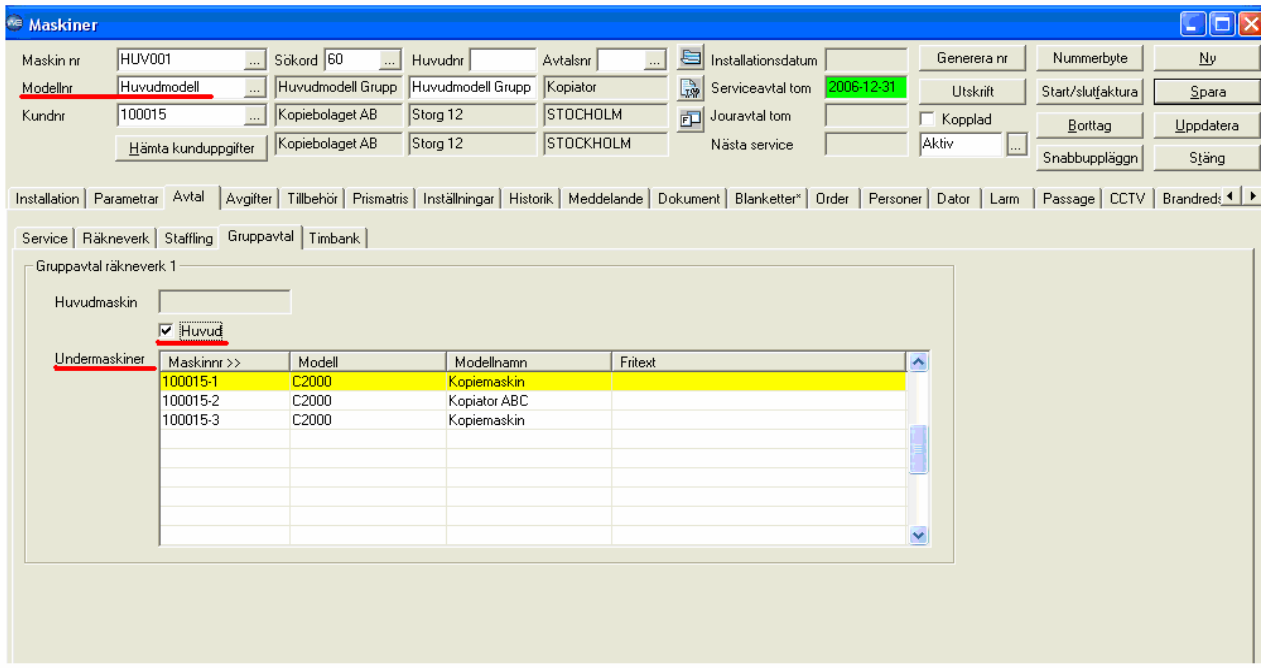


The main machine's machine number must be registered for the sub-machine.

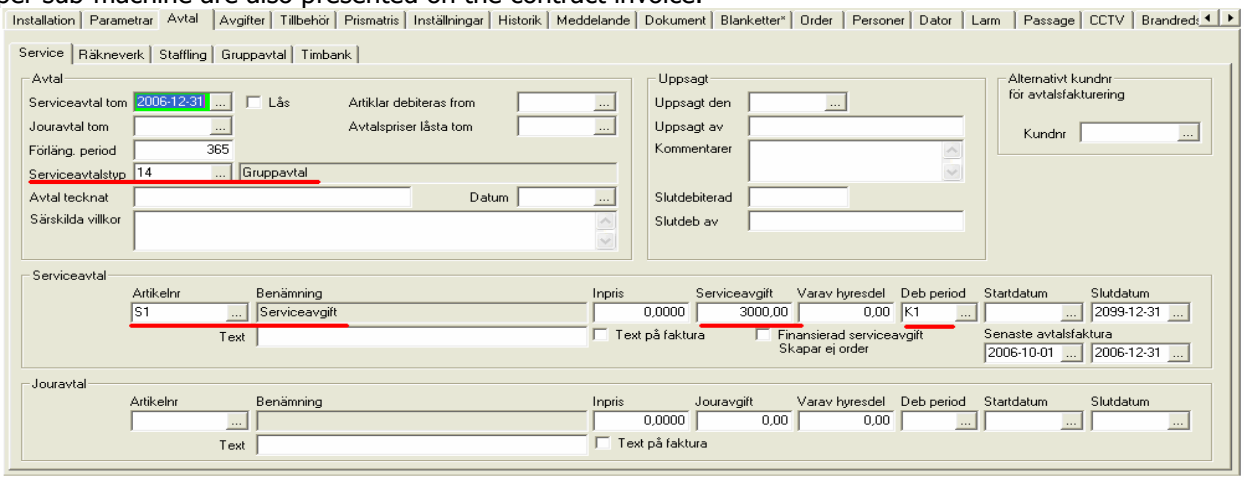


Report card and report card period must be defined, and the accumulation type is set to Excess quantity is accumulated to main machine.
The text, Copy debiting, or whatever you want to call the article, is only to facilitate counter registration debiting. It has no function. Price and incoming volume shall **not** be defined for the sub-machine.

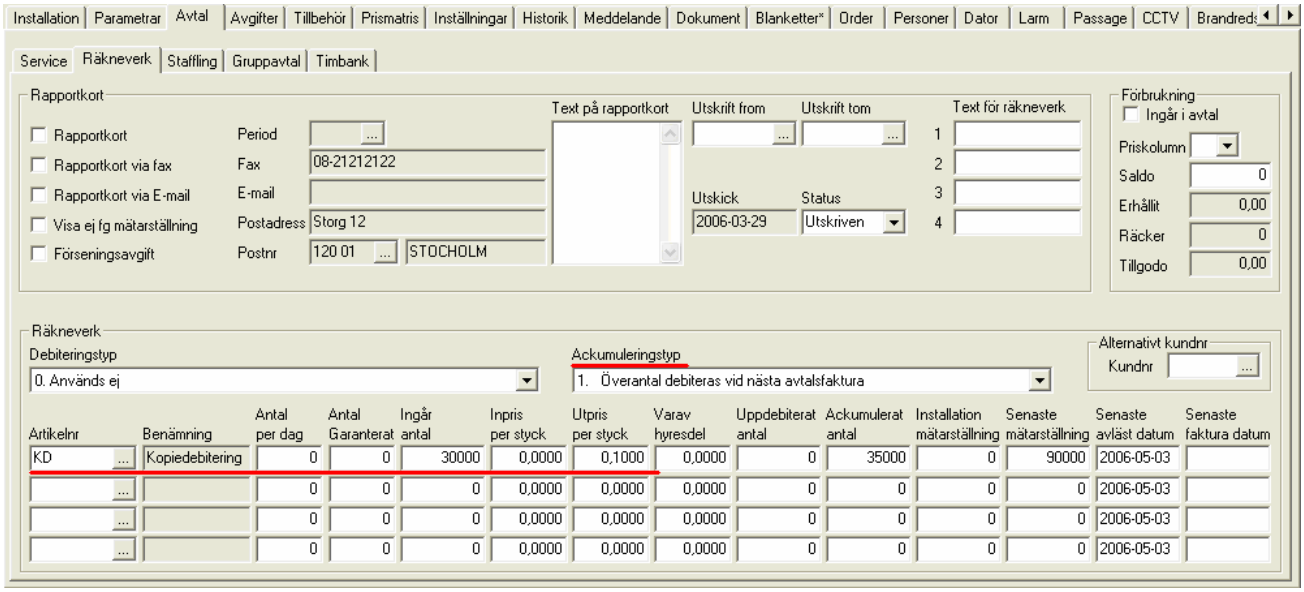
Set up main object



Assign a machine number (serial number), a model and a customer to the main machine. Save the main machine; only then can a sub-machine be linked.
Tick the box to make the main machine (the virtual one) a main machine, and define the sub-machines linked to the main machine (the contract). You can make our own notes in the free text field. The contract invoice shows the sub-machines (machine numbers) that the contract covers, model numbers, location and counter reading per sub-machine are also presented on the contract invoice.



The main contract defines an article for service fee description. Incoming copy volume for all sub-machines included in the group contract, multiplied by price per copy, constitutes the service fee, or if you prefer a fixed service fee, you set that here.
You also determine the debit period.



The accumulation type is set to "Excess quantity is debited on the next contract invoice". Finally, you define an article for the copy fee description, and price per copy for any excess quantity.

Keys

Go to last item

Go to first item

Go to next item

Go to previous item

Clear view

Printing settings

Delete

Service order

Service order queue

Counter registration

Time registration

Unit package

Contractual invoicing

Consumption order

List consumption orders

Orders

List orders

Status

Status technician

Status district

Group dispatch

E-mail

Todo

Contacts

Customers

Objects/Machines/Installations

Sale forecast

Calendar

Planning calendar

Notes

Time clock

External programs

MS Excel

Open field

Locked field

Colours

Row up

Row down

Outlook express

Create folder structure

Search folder

Create recurring ToDo

Click the icon to copy a service order.

Click the icon to open the Eniro map feature.

Click the icon to e-mail via the SMTP server.

Click the icon to send an e-mail to your provider's SMS service. The provider will transform your e-mail into a text message and send it to the technician.

This feature enables you to fax a document through your fax software (optional).

Click this icon to check if the technician has the right training for the job.

Click the symbol to update the summary.

Click the icon to open the folder to which the path leads.

Click the icon to see more booked time registration rows.

Click the icon at the start or finish of a service call. Real-time completion.

Click the icon to add an action code and action description to each time registration row.

Click this icon to restore the columns to the default position.

Click the icon to restore you selections to the default position.

Legends

[ESC]	Close active window
[F2]	Save post
[F3]	Close window
[F4]	Open list
[F5]	Clear all fields
[F6]	Go to next group of fields/Create order
[F7]	Backward
[F8]	Forward
[F9]	Collect data
[TAB]	TAB to next field
[SHIFT + TAB]	TAB back one field
[CTRL + C]	Copy
[CTRL + X]	Cut
[CTRL + V]	Paste
[CTRL + F6]	Alternate active windows (even with [Alt + F6])